



VISIT *Billings*[®]



Billings Visitor Profile

2017/2018

Final Report of Findings
January 2019

Research prepared for Visit Billings by

Destination  Analysts

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Research Overview

This report presents the findings of a comprehensive visitor profile study conducted by Destination Analysts, Inc. on behalf of Visit Billings. The data presented here comes from an in-person intercept survey of Billings area visitors at locations throughout the destination. To be considered a visitor, survey respondents had to reside outside of Yellowstone County.

This report presents the top-line survey data collected from these surveys between August 2017 and April 2018. The sampling strategy evenly split collection between visitors to Billings during the peak season and shoulder season.

In total, 930 completed surveys from Billings visitors were collected during this research study.



Research Objectives

The overarching goal of this survey-based research was to create in-depth profiles of Billings visitors, including:

- Detailed trip characteristics (i.e. tripographic information like the reason for visiting the Billings area, length of stay, place of stay, etc.)
- Travel party composition
- Activities & attractions visited in the Billings area
- Evaluation of Billings brand attributes
- Detailed Billings visitor spending estimates
- Travel planning resources used by Billings area visitors
- Visitor satisfaction
- Visitor demographics

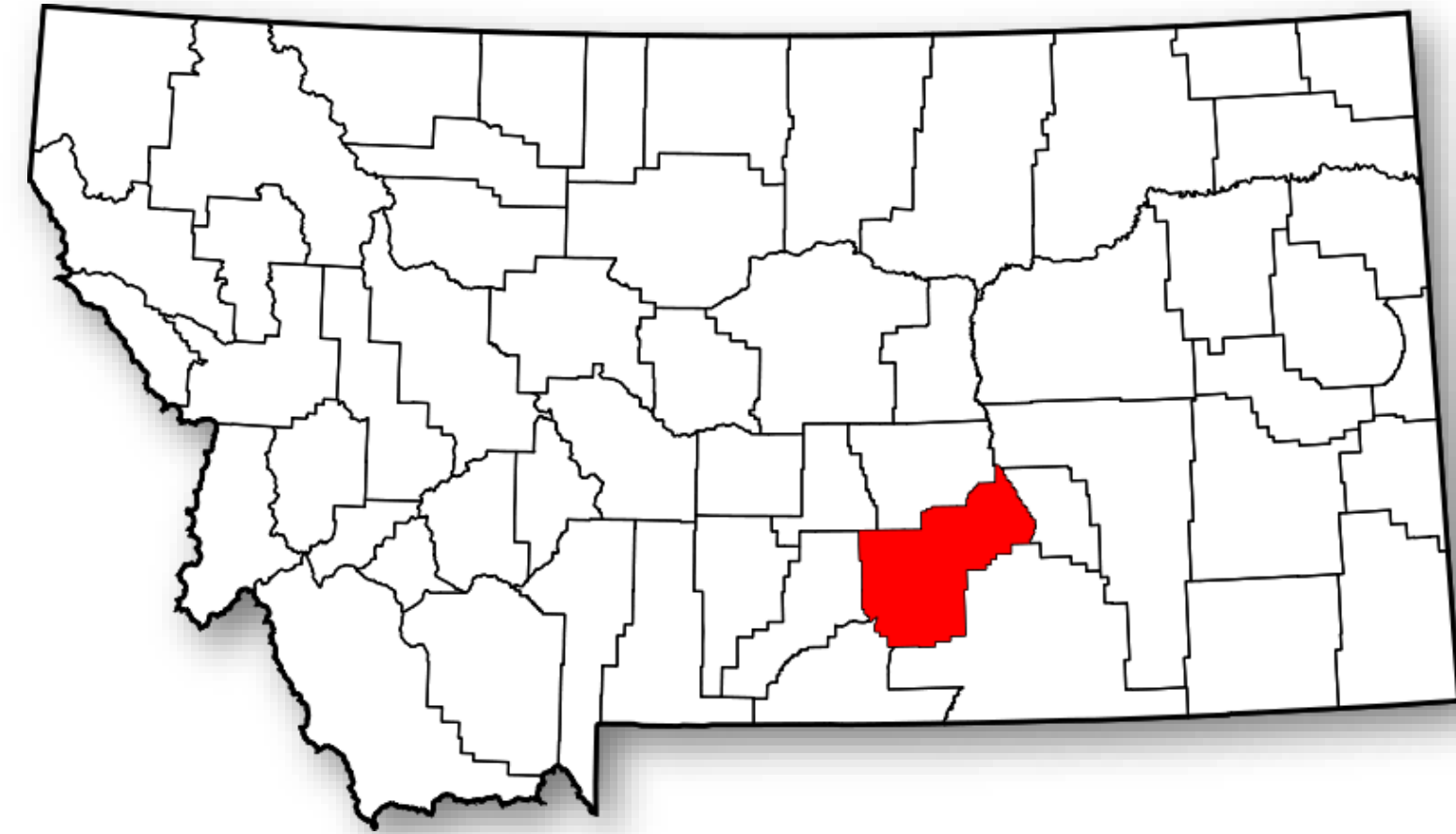


Image: Map of Montana highlighting Yellowstone County.

In addition to developing a comprehensive, multi-segment Billings area visitor profile, data from this research has been used to estimate the economic impact of tourism to Billings.

Methodology

The research is based on an intercept survey of visitors to the Billings area collected at locations around Yellowstone County.

Through the duration of this study (August 2017 through April 2018), 930 completed surveys from Billings visitors were collected (+16.3% above sample goal of 800 completes) were collected from four different groups of visitors:

1. Hotel—Visitors who stayed overnight at a Billings area hotel during their trip
2. Home Sharing—Visitors who stayed overnight at a Billings area home sharing rental during their trip
3. VFR—Visitors who stayed overnight in a private residence of a friend or family member in the Billings area
4. Day Trip—Visitors who did not stay overnight anywhere in the Billings area

The visitor data was weighted to reflect the actual population of visitors to the Billings area based on their place of stay. To weight the data, the incidence of visitors (by place of stay) experienced in intercept survey sites outside hotel properties was used. This step was taken to avoid over-representing lodging guests in the overall population of the visitor sample.

Visitor Intercept Survey Overview

Destination Analysts' survey team worked at locations around the Billings area to randomly select and interview visitors. The questionnaire was administered to persons residing outside Yellowstone County at the following locations:



Image: Destination Analysts' team member surveying visitors at Pictograph Cave State Park.

- Billings Logan International Airport
- BW PLUS Kelly Inn & Suites
- DoubleTree by Hilton Billings
- Hampton Inn by Hilton Erck Hotels
- Moss Mansion
- Northern Hotel
- Pictograph Cave State Park
- Rimrock Arena
- Western Heritage Center
- Yellowstone Art Museum
- Yellowstone County Museum
- ZooMontana

Additional Research Conducted

An online survey of regional travelers was conducted to explore the perceptions of the Billings brand from the perspective of regional travelers.

The primary objectives of this research were to:

- Identify general motivators for leisure trips taken in the western U.S.
- Benchmark regional & non-regional travelers' perceptions of Billings
- Examine motivations for visiting Billings
- Provide profiles of potential regional and National leisure visitors to Billings
- Measure future travel intentions to Billings
- Understand deterrents to visiting Billings

In total, 1,384 completed responses were collected in the 2018 National/Regional Traveler Survey. 811 surveys were collected from regional travelers (those who reside within a 500-mile radius from Billings) and 573 surveys were completed from non-regional travelers (those who reside outside a 500-mile radius from billings).



Above: Images of Billings. Courtesy of Instagram.com/MontanasTrailhead

An aerial photograph of a city, likely Boise, Idaho, featuring a prominent tall skyscraper in the center. The city is surrounded by dense green trees in the foreground and rolling hills in the background. The text 'EXECUTIVE SUMMARY' is overlaid in the center of the image.

EXECUTIVE SUMMARY

THE BILLINGS DESTINATION BRAND

SOURCE: 2018 BILLINGS NATIONAL/REGIONAL TRAVELER SURVEY

Executive Summary – The Billings Destination Brand

- **Familiarity with the Billings destination brand is moderate.** In total, 50.2 percent consider themselves familiar or very familiar with the destination. A significantly smaller proportion, 27.7 percent, reported being unfamiliar with Billings. Meanwhile, about one-in-five said they were neutral – neither familiar nor unfamiliar with Billings as a place to visit (22.2%). Regional travelers were much more likely to rate themselves “familiar” or “very familiar” with Billings compared to non-regional travelers (top-two box scores of 59.8% vs. 36.5%, respectively).
- **Travelers consider Billings to be an appealing leisure destination.** Just under six-in-ten travelers consider Billings to be appealing (36.0%) or very appealing (22.0%). While similar percentages of regional and non-regional travelers described Billings as “appealing”, non-regional travelers were more likely to consider it a “very appealing” destination (28.1% vs. 17.6%, respectively).
- **Travelers are moderately likely to visit Billings for leisure in the near future.** Over half of all respondents said that they are likely (27.0%) or very likely (26.7%) to visit Billings for leisure in the next three years. Regional travelers reported a higher likelihood of visiting Billings in the next three years compared to non-regional travelers (58.2% vs. 47.5%, respectively).
- **Shopping, dining and parks are the top-of-mind experiences that Billings offers visitors.** In an open-ended question, travelers were asked to think about Billings as a place to visit and write in the top attractions, places to visit, things to do and experiences in the area. One-quarter of respondents wrote in shopping/antiques (24.9%), while one-fifth wrote in dining/restaurants (21.2%). The next most commonly written-in response were national/state parks (16.5%), “wide range of attractions” (14.7%) and “scenery/wildlife viewing” (14.0%).

Executive Summary – The Billings Destination Brand

- **Billings is a destination associated with beautiful scenery, nature/wildlife and urban/small town charm.** In another open-ended question, travelers were asked to picture Billings and think of the specific words that describe the destination. Beautiful scenery (31.6%), nature/wildlife (29.4%), city life/urban (19.6%) and “small-town charm” (19.6%) were the most common descriptions, each written in by one-fifth or more of respondents.
- **Billings is seen as touristy and crowded by some travelers.** Presented with a set list of negatively slanted words and phrases, respondents were asked to select all those that accurately describe Billings. In total, 14.5 percent selected “touristy” as a word to describe Billings. Approximately 10 percent or higher of travelers also perceive Billings to be “crowded” (12.9%), “bland” (12.8%), “boring” (11.5%), “congested” (11.3%), “hard to get to” (10.3%), and/or “generic” (10.2%). **Just under half of all travelers surveyed reported that none of the negatively slanted words describe Billings (43.1%).**
- **For both regional and non-regional travelers surveyed, scenic beauty, affordability and restaurants were considered the most important attributes in selecting leisure destinations in the Western U.S.** Interestingly though, regional travelers appear to place more importance on scenic beauty (90.9% vs. 83.4%) and affordability (91.0% vs. 82.7%) compared to non-regional travelers. In terms of secondary destination attributes, non-regional travelers placed more importance on family-friendly activities (65.3% vs. 58.6%) and urban sightseeing/exploration (63.7% vs. 46.6%).
- **Perceptions of Billings’ destination attributes differ between regional and non-regional travelers.** Regional travelers were much more likely to rate Billings’ highly for its restaurants and food (71.1% vs. 56.7%) and good shopping options (58.3%). Meanwhile, non-regional travelers were more likely to rate Billings’ highly for scenic beauty (75.2% vs. 64.0%), outdoor recreation activities (72.6% vs. 64.5%), historic attractions (60.9% vs. 57.0%), off the beaten path ambiance (66.3% vs. 42.2%), iconic attractions (50.1% vs. 37.5%) and urban sightseeing/exploration (46.9% vs. 36.3%).

Executive Summary – The Billings Destination Brand

- **Billings performs above average or on par for the destination attributes that are considered least important to the destination decision process but underperforms for the most important to travelers surveyed.** Amongst the attributes tested, Billings performs well for outdoor recreation activities, shopping, craft breweries, nightlife and live music. However, these attributes are relatively less important to the destination choice.
- **Billings performs sub-par for the top five attributes that are important in selecting leisure destinations in the west; scenic beauty, affordability, restaurants, historic sites and iconic attractions.** Educating travelers about Billings' assets in these areas should be a high priority in its marketing messaging.
- **Deterrents to visiting Billings differs between regional and non-regional travelers.** Regional travelers were much more likely to say they have more interest in other destinations (43.6% vs. 26.5%) and/or personal financial reasons (27.3% vs. 18.7%) are keeping them from visiting Billings more often. Meanwhile, non-regional travelers were more likely to feel they don't know enough about the destination (30.5% vs. 16.6%) and/or that airfare is too expensive (21.1%).

THE BILLINGS VISITOR

SOURCE: 2017/18 BILLINGS VISITOR PROFILE STUDY

Executive Summary – The Billings Visitor

Visitor Point of Origin

- **In total, 97.9 percent of visitors surveyed were domestic residents and 2.1 percent were international visitors.** The top international markets represented in the sample were Canada (0.7%), Germany (0.2%) and United Kingdom (0.1%).
- **In total, 48.5 percent of domestic Billings area visitors surveyed were reside in Montana.** The remaining 51.5 percent were out-of-state residents with the highest visitation from residents of Wyoming (12.0%), California (3.6%) and Colorado (3.4%).
- **The top visitor markets represented in the survey sample were Denver-Boulder (6.7%) and Minneapolis-St. Paul, MN-WI (4.9%).** These were followed by Phoenix-Mesa, AZ (4.3%), Seattle-Everett, WA (4.0%) and Portland, OR-WA (3.8%).

Purpose of Visit & Place of Stay

- **Just under half of all visitors surveyed in this research study traveled to the Billings area primarily for leisure purposes (46.0%).** One-in-five visitors surveyed (20.7%) were in the Billings area for business, a convention/group meeting or government travel. One-in-ten (10.7%) were visiting family in the area.
- **Approximately one-half of all overnight visitors surveyed stayed in a Billings area hotel during their trip (47.3%).** Less than one-in-ten overnight visitors stayed in the private residence of a local friend or family member (7.4%). Home sharing rentals such as those booked through Airbnb and VRBO captured 1.4 percent of overnight area visitors.
- **Hotel guests had an average of 2.1 people in their room, including themselves and reportedly spent \$111.36 on their lodging accommodations per day.**

Executive Summary – The Billings Visitor

Visitor Trip Details

- **The most important factors motivating visitors to come to the Billings area were a special event or festival (27.8%), shopping opportunities (26.2%), a good deal on airfare (23.5%) and friends or family in the area (20.4%).** Other top factors important to visitors' decision to take a trip to the Billings area included local businesses (14.5%), sporting events (9.2%) and agricultural needs (6.5%).
- **The top visited attractions in the area include Downtown Billings (41.8%), MetraPark (28.0%), Scheel's (13.3%) and Rimrock Mall (10.8%).**
- **On average, survey respondents participated in 2.2 different activities while visiting the destination.** Of the activities tested, dining in restaurants (72.0%) was the top activity visitors participated in during their Billings trip. Additionally, 51.1 percent went shopping, 28.3 attended a special event or festival and 12.1 percent visited local friends and/or family in the area.
- **Visiting travel parties spent an average of \$252.15 in the Billings area per trip day.** It is estimated that the average Billings area visitor represents \$126.08 in daily in-market spending. This is based on the reported daily spending of \$252.15 covering an average of 2.0 travelers.
- **A majority of visitors said Billings was the sole primary destination for their trip.** In total, 62.0 percent of respondents were only visiting Billings on their trip while 38.0 percent were visiting other destinations. Amongst these visitors the top other destinations visited as part of their Billings trip were Wyoming (25.6%) and Nevada (8.8%).

Executive Summary – The Billings Visitor

Trip Planning & Visitor Satisfaction

- **Before arriving in the Billings area, online travel agencies are the most-utilized trip planning resource, used by over one-quarter of visitors surveyed (26.5%).** The next most utilized resources are traditional (offline) travel agencies (7.3%) and reviews websites like Yelp and TripAdvisor (4.8%). **Additionally, 2.8 percent reported using the official Billings visitors website, VisitBillings.com, to plan their trip to the area before their arrival.** Visitors continued to turn to reviews websites like Yelp and TripAdvisor to plan their trip while in the destination, although to a lesser degree compared to pre-arrival (1.7% vs. 4.8%).
- **Shopping, general activities, access to city services and the people in Billings were the most liked aspects of the destination amongst visitors surveyed.** Additionally, access to city services such as cellular service and medical care (12.0%) and “the people/residents” (11.1%) were the most commonly named favorite aspects of the area.
- **When asked what attractions or services would have most enhanced visitors’ experience in the Billings area, nearly one in five respondents said they would like expanded entertainment options (18.2%).** Other top suggestions were to make improvements to transportation (13.8%) and restaurants (6.9%), and offer more shopping (6.4%) and recreational activities (5.6%).
- **Visitors reported a high likelihood to return to the Billings area in the future—a strong indicator of satisfaction.** In total, 95.6 percent of visitors surveyed said they indeed would return to the Billings area. Nearly all visitors surveyed also said they are likely to recommend Billings to other travelers (96.3% said they were “likely” (23.7%), “very likely” (59.3%) or “certain” (13.3%) to recommend visiting Billings).

An aerial photograph of Billings, Montana, showing rolling hills in the background and a cityscape with trees in the foreground. The image is overlaid with a semi-transparent white box containing text.

THE BILLINGS DESTINATION BRAND

SOURCE: 2018 BILLINGS NATIONAL/REGIONAL TRAVELER SURVEY

ABOUT THIS SECTION

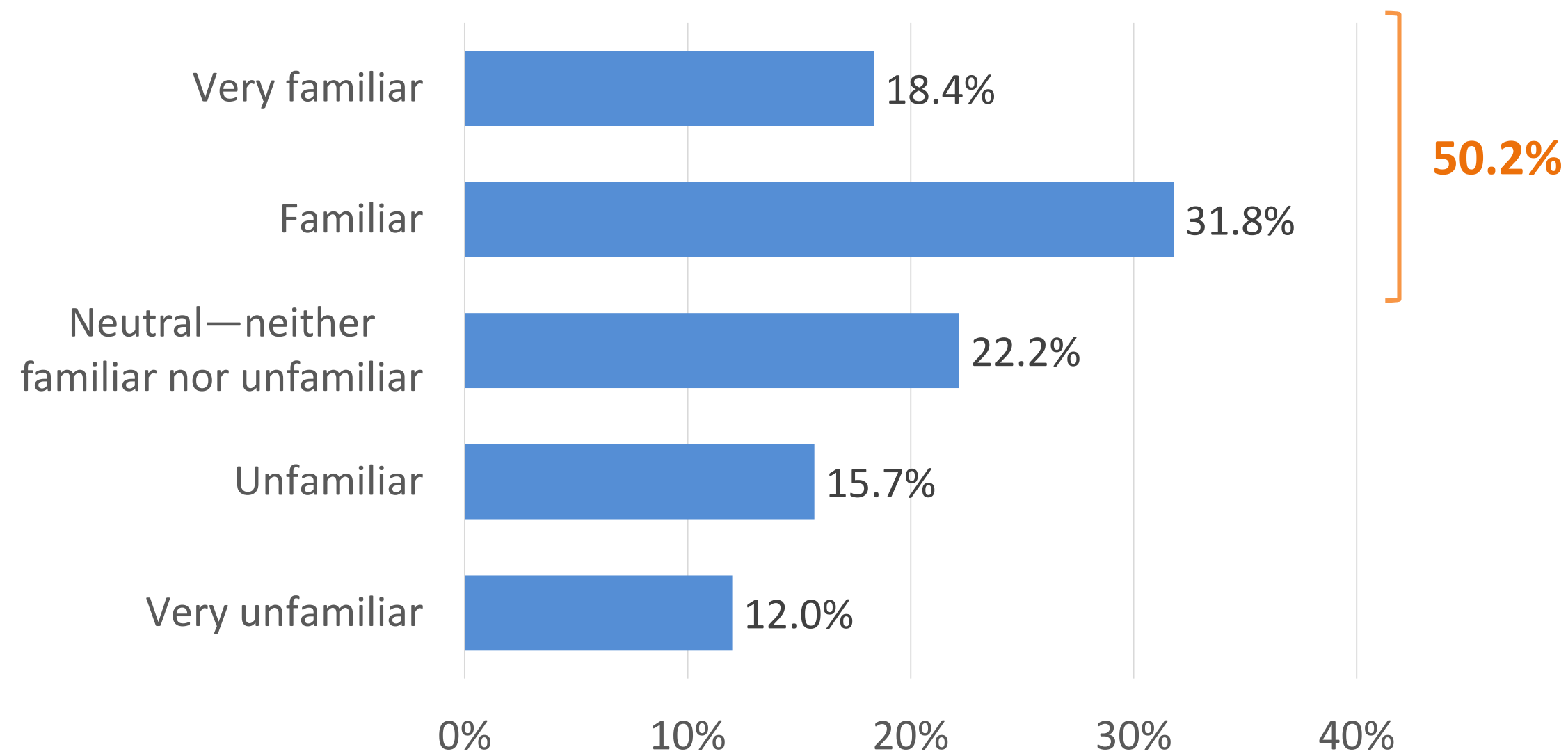
In the remainder of this section, data from the National/Regional Survey findings is presented as follows:

- The aggregate total is shown in the chart on the left
- On the right, a data table shows the findings broken out by respondent's residence:
 1. **Regional Travelers** – travelers who reside within a 500-mile radius from Billings, excluding Yellowstone County residents
 2. **Non-Regional Travelers** – travelers who reside outside a 500-mile radius from billings.

Familiarity with Billings

Familiarity with the Billings destination brand is moderate. Presented with a five-point scale, travelers were asked to rate their level of familiarity with Billings as a place to visit. In total, 50.2 percent consider themselves familiar or very familiar with the destination. A significantly smaller proportion, 27.7 percent, reported being unfamiliar with Billings. Meanwhile, about one-in-five said they were neutral – neither familiar nor unfamiliar with Billings as a place to visit (22.2%). Regional travelers were much more likely to rate themselves “familiar” or “very familiar” with Billings compared to non-regional travelers (top-two box scores of 59.8% vs. 36.5%, respectively).

Figure 1: Familiarity with Billings



Detail by Point of Origin

	Total	Regional Traveler	Non-Regional Traveler
Top-Two Box Score	50.2%	59.8%	36.5%
Very familiar	18.4%	21.0%	14.7%
Familiar	31.8%	38.8%	21.8%
Neutral—neither familiar nor unfamiliar	22.2%	21.5%	23.2%
Unfamiliar	15.7%	12.7%	19.9%
Very unfamiliar	12.0%	6.0%	20.4%
Base	1384	811	573

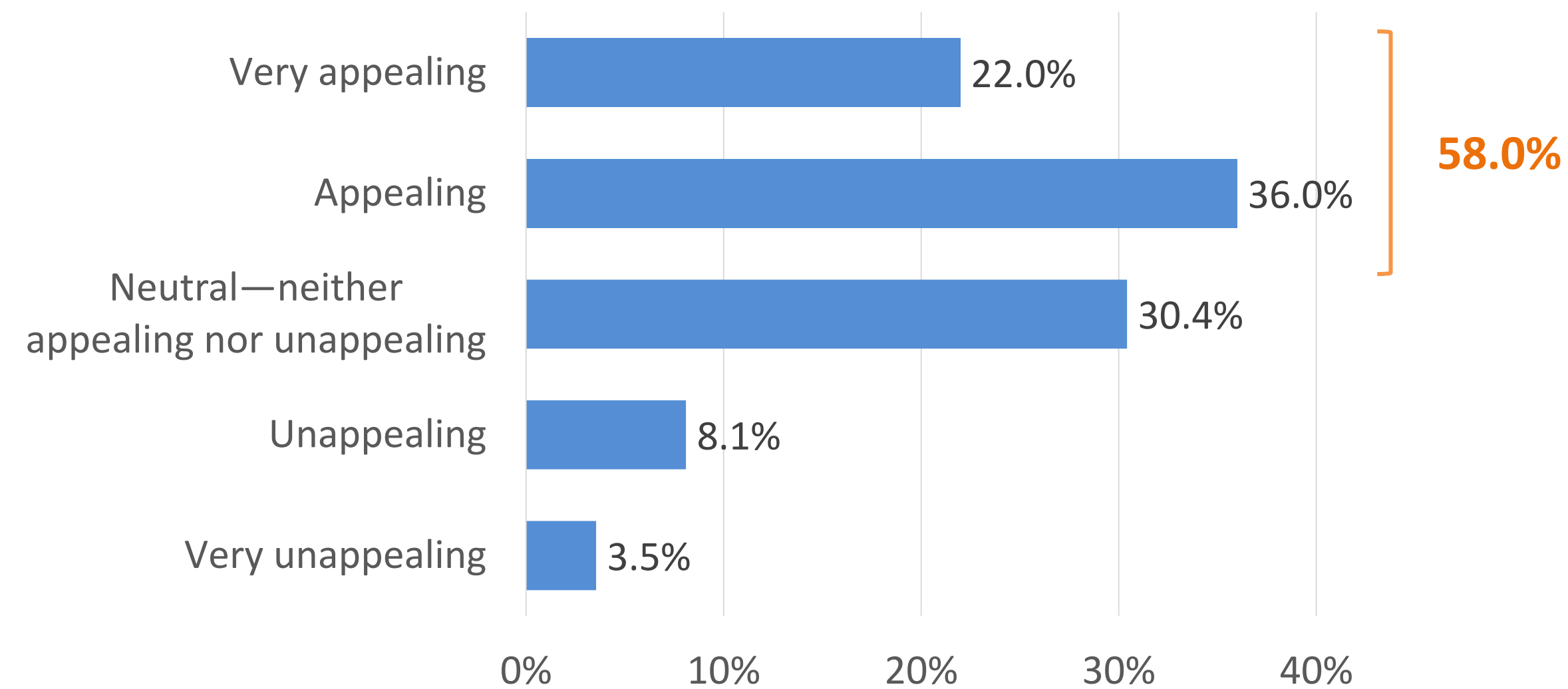
Base: All respondents. 1,384 responses.

Question: How familiar are you with Billings, MT as a place to visit?

Appeal of Billings

Travelers consider Billings to be an appealing leisure destination. Presented with a five-point scale, travelers were asked to rate how appealing a leisure trip to the Billings would be. Just under six-in-ten travelers consider Billings to be appealing (36.0%) or very appealing (22.0%). This is slightly higher than the percentage of travelers who consider themselves familiar with Billings (50.2%; Figure 1). Meanwhile, three-in-ten travelers rated Billings as “neutral – neither appealing nor unappealing” (30.4%). While similar percentages of regional and non-regional travelers described Billings as “appealing”, non-regional travelers were more likely to consider it a “very appealing” destination (28.1% vs. 17.6%, respectively).

Figure 2: Appeal of Billings



Detail by Point of Origin

	Total	Regional Traveler	Non-Regional Traveler
Top-Two Box Score	58.0%	53.0%	64.9%
Very appealing	22.0%	17.6%	28.1%
Appealing	36.0%	35.4%	36.8%
Neutral—neither appealing nor unappealing	30.4%	33.8%	25.7%
Unappealing	8.1%	9.1%	6.6%
Very unappealing	3.5%	4.1%	2.8%
Base	1384	811	573

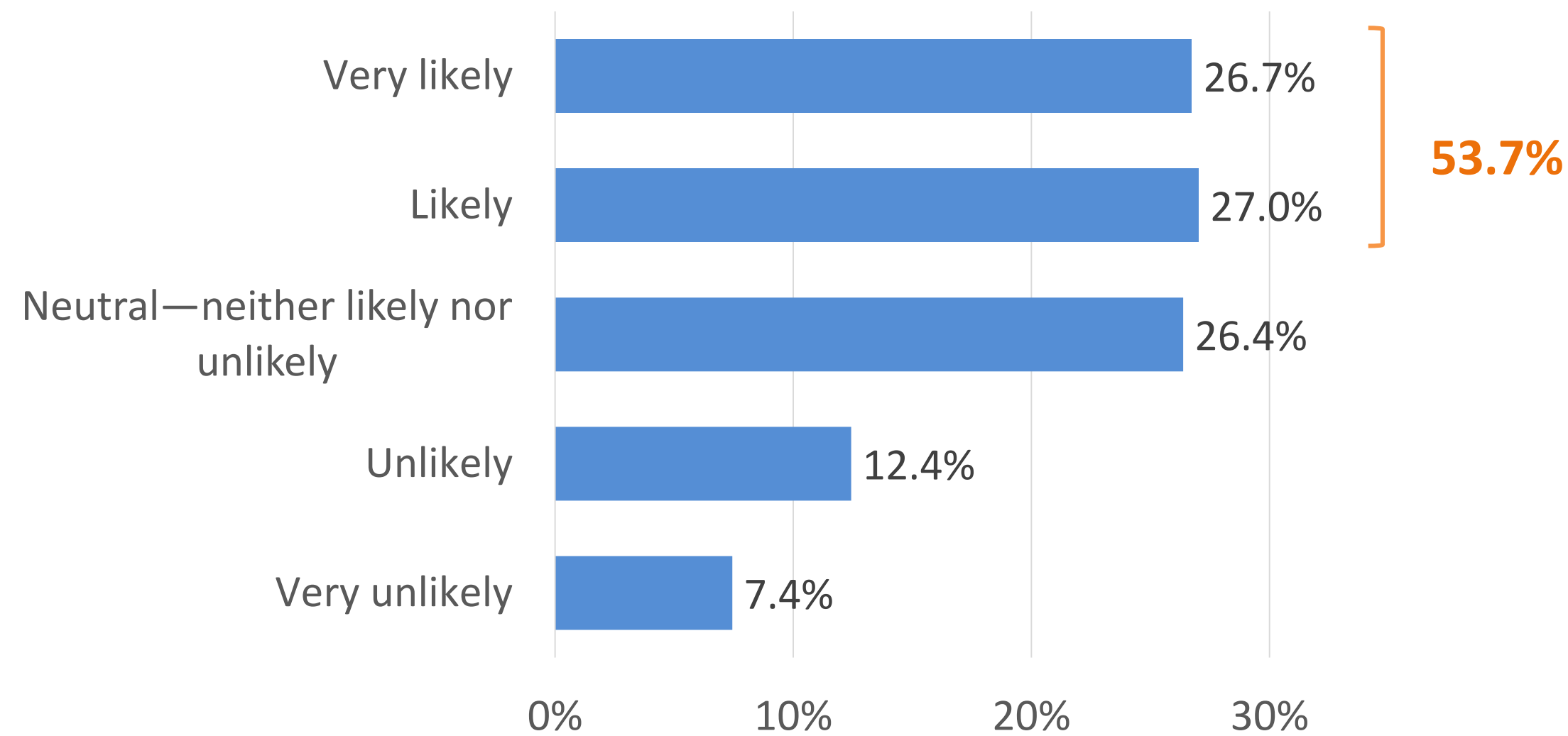
Base: All respondents. 1,384 responses.

Question: How appealing is taking a leisure trip to Billings?

Likelihood of Visiting Billings

Travelers are moderately likely to visit Billings for leisure in the near future. Over half of all respondents said that they are likely (27.0%) or very likely (26.7%) to visit Billings for leisure in the next three years. Regional travelers reported a higher likelihood of visiting Billings in the next three years compared to non-regional travelers (58.2% vs. 47.5%, respectively). One-quarter of all respondents are neutral in their likelihood of visiting (26.4%), highlighting an opportunity to influence these travelers. Educating travelers about Billings as a leisure destination will not only increase familiarity with and appeal of the destination, but ultimately increase the likelihood of visiting and generating economic activity in the destination.

Figure 3: Likelihood of Visiting Billings



Detail by Point of Origin

	Regional Travelers	Non-Regional Travelers
Top-Two Box Score	58.2%	47.5%
Very likely	29.6%	22.7%
Likely	28.6%	24.8%
Neutral—neither likely nor unlikely	24.4%	29.1%
Unlikely	11.5%	13.8%
Very unlikely	5.9%	9.6%
Base	811	573

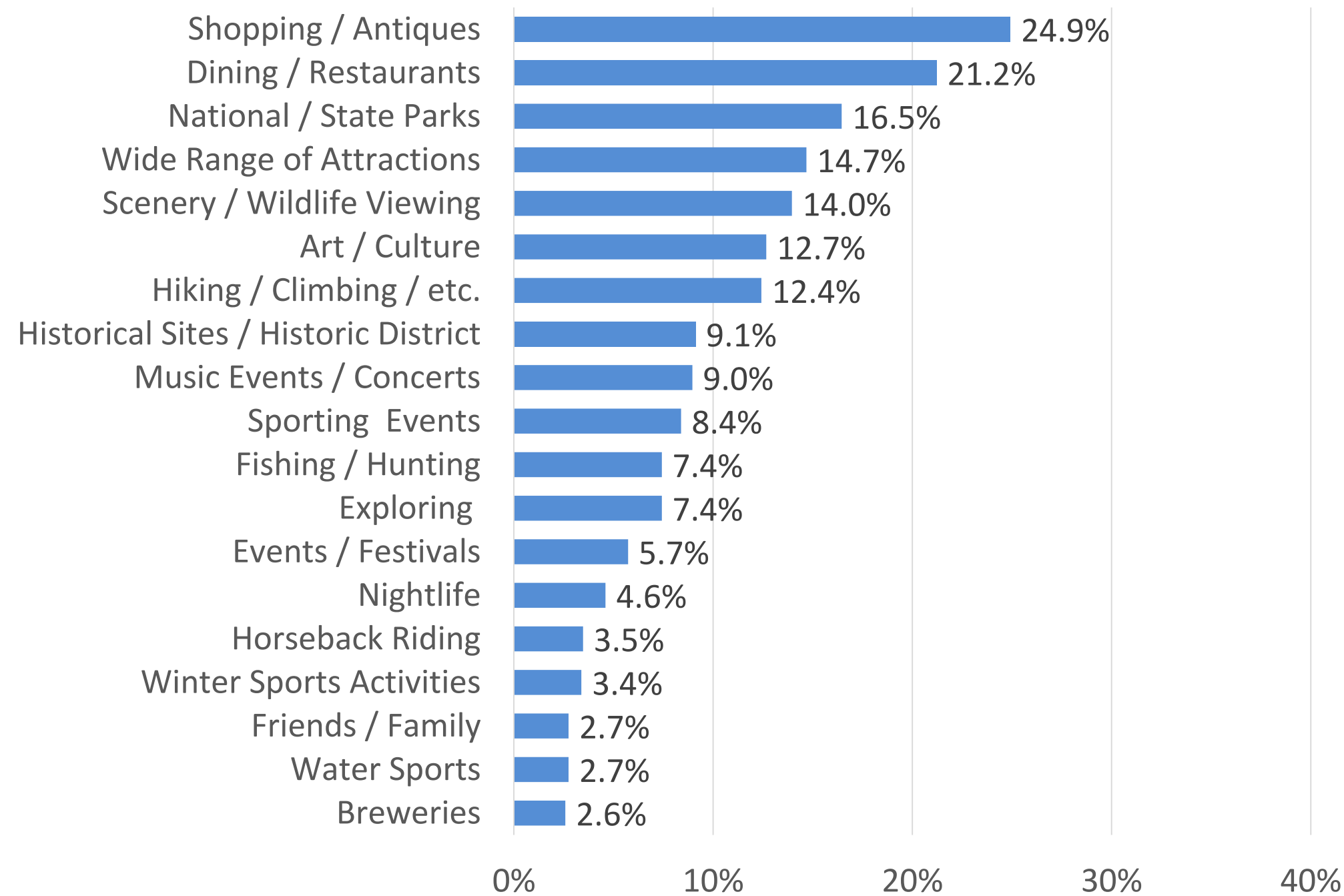
Base: All respondents. 1,384 responses.

Question: How likely are you to visit Billings for leisure in the next 3 years?

Attractions in Billings (unaided)

Shopping, dining and parks are the top-of-mind experiences that Billings offers visitors. In an open-ended question, travelers were asked to think about Billings as a place to visit and write in the top attractions, places to visit, things to do and experiences in the area. One-quarter of respondents wrote in shopping/antiques (24.9%), while one-fifth wrote in dining/restaurants (21.2%). The next most commonly written-in response were national/state parks (16.5%), “wide range of attractions” (14.7%) and “scenery/wildlife viewing” (14.0%). Non-regional travelers were more likely to write in outdoor activities like “wildlife viewing” (22.8% vs. 8.6%) and “hiking/climbing” (15.5% vs. 10.5%), while regional travelers were more likely to write in urban experiences like shopping (34.4% vs. 9.4%), art/culture (14.5% vs. 9.6%) and concerts (13.1% vs. 2.1%).

Figure 4: Attractions in Billings (unaided)



Detail by Point of Origin

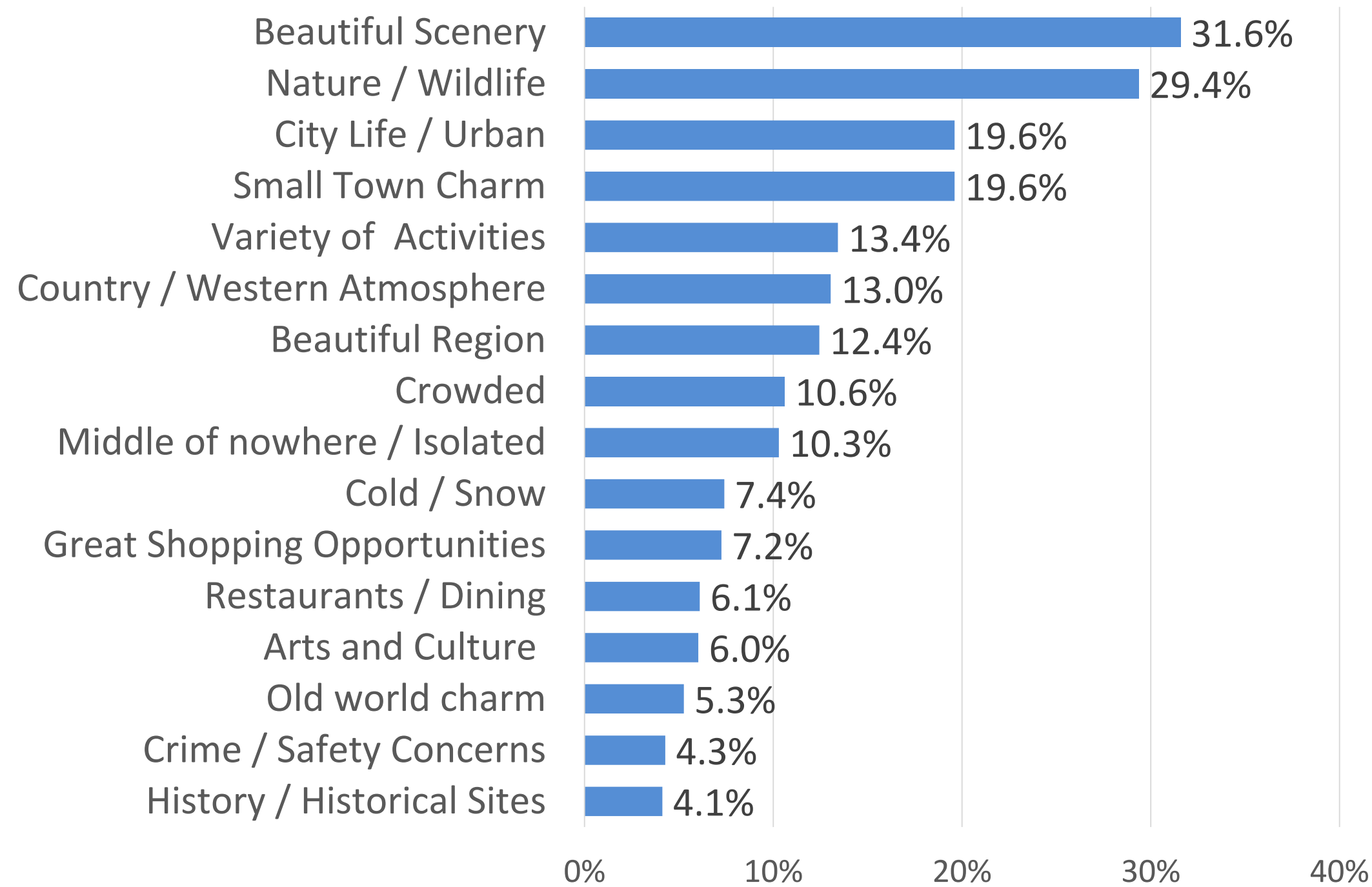
	Regional Travelers	Non-Regional Travelers
Shopping / Antiques	34.4%	9.4%
Dining / Restaurants	25.7%	13.8%
National / State Parks	18.8%	12.6%
Wide Range of Attractions	15.7%	13.0%
Scenery / Wildlife Viewing	8.6%	22.8%
Art / Culture	14.5%	9.6%
Hiking / Climbing / etc.	10.5%	15.5%
Historical Sites / Historic District	10.0%	7.7%
Music Events / Concerts	13.1%	2.1%
Sporting Events	9.4%	6.8%
Fishing / Hunting	6.9%	8.3%
Exploring	6.5%	8.9%
Events / Festivals	7.0%	3.6%
Nightlife	5.3%	3.4%
Horseback Riding	1.9%	6.0%
Winter Sports Activities	2.6%	4.7%
Friends / Family	3.9%	0.9%
Water Sports	3.4%	1.7%
Breweries	3.5%	1.1%
Sample Size:	770	470

Question: Thinking of Billings, MT as a place to visit, what are the top attractions, places to visit, things to do and experiences Billings offers you as a visitor? Base: All respondents. 1,240 responses.

Descriptions of Billings (unaided)

Billings is a destination associated with beautiful scenery, nature/wildlife and urban/small town charm. In another open-ended question, travelers were asked to picture Billings and think of the specific words that describe the destination. The chart and data table below show the top 16 descriptions cited. Beautiful scenery (31.6%), nature/wildlife (29.4%), city life/urban (19.6%) and “small-town charm” (19.6%) were the most common descriptions, each written in by one-fifth or more of respondents. Other descriptions of Billings were “variety of activities” (13.4%), “country/western atmosphere” (13.0%) and “beautiful region” (12.4%). Non-regional travelers were more likely to mention nature-related aspects of the destination, while regional travelers are far more likely to describe Billings as “urban” (26.4% vs. 9.0% for non-regional travelers) and to mention its cosmopolitan aspects such as “great shopping opportunities” (11.6% vs. 0.4%) and “restaurants/dining” (8.6% vs. 2.1%). This indicates an opportunity to further educate non-regional travelers about these urban offerings.

Figure 5: Descriptions of Billings (unaided)



Question: Please picture Billings, MT in your mind—and think of the SPECIFIC WORDS that describe the city. Please write in the first adjectives or descriptive words or phrases that come to mind. Base: All respondents. 1,311 responses.

Detail by Point of Origin

	Regional Travelers	Non-Regional Travelers
Beautiful Scenery	29.3%	35.2%
Nature / Wildlife	25.4%	35.5%
City Life / Urban	26.4%	9.0%
Small Town Charm	19.1%	20.3%
Variety of Activities	14.1%	12.3%
Country / Western Atmosphere	12.5%	13.9%
Beautiful Region	12.4%	12.5%
Crowded	15.9%	2.3%
Middle of nowhere / Isolated	10.9%	9.4%
Cold / Snow	6.1%	9.4%
Great Shopping Opportunities	11.6%	0.4%
Restaurants / Dining	8.6%	2.1%
Arts and Culture	6.3%	5.7%
Old world charm	5.5%	4.9%
Crime / Safety Concerns	6.5%	0.8%
History / Historical Sites	5.0%	2.7%
Sample Size:	799	512

Descriptions of Billings (positive—aided)

Non-regional travelers were relatively less likely to describe Billings as **affordable, historic, and foodie-friendly**. This aligns with their lower likelihood compared to regional travelers to associate the destination with urban offerings. Non-regional travelers were more likely to describe Billings as beautiful, relaxing and peaceful, in line with their assessments of the nature-related offerings of the destination. Regional travelers were more likely to describe Billings as family-friendly, welcoming, and easy to get to.

Question: Which of these words or phrases accurately describe Billings? (Select all that apply) Base: All respondents. 1,384 responses.

Figure 6: Descriptions of Billings—Positive Aided (Detail by Point of Origin)

	Regional	Regional Traveler	Non-Regional Traveler
Scenic	45.5%	42.8%	49.4%
Affordable	38.2%	44.3%	29.7%
Beautiful	36.8%	30.5%	45.9%
Family-friendly	36.7%	40.8%	30.9%
Welcoming	35.9%	38.6%	32.1%
Easy to get to	32.2%	46.5%	11.9%
Historic	32.2%	36.7%	25.7%
Relaxing	27.2%	23.2%	33.0%
Peaceful	26.8%	19.6%	37.0%
Adventurous	25.1%	21.1%	30.9%
Safe	24.0%	24.8%	22.9%
Uncrowded	23.6%	22.3%	25.3%
Fun	23.0%	24.3%	21.3%
Foodie-friendly	20.2%	25.2%	13.3%
Unique	18.8%	14.5%	24.8%
Genuine	18.7%	16.8%	21.5%
Diverse	13.6%	15.9%	10.3%
Exciting	12.6%	9.2%	17.3%
Artsy	9.0%	8.9%	9.2%
Romantic	5.6%	2.5%	10.1%
Hip	5.3%	4.8%	5.9%
NONE OF THESE	8.2%	8.9%	7.2%
Sample Size:	1384	811	573

Descriptions of Billings (negative—aided)

Billings is seen as touristy and crowded by some travelers. Presented with a set list of negatively slanted words and phrases, respondents were asked to select all those that accurately describe Billings. In total, 14.5 percent selected “touristy” as a word to describe Billings. Approximately 10 percent or higher of travelers also perceive Billings to be “crowded” (12.9%), “bland” (12.8%), “boring” (11.5%), “congested” (11.3%), “hard to get to” (10.3%), and/or “generic” (10.2%).

Just under half of all travelers surveyed reported that none of the negatively slanted words describe Billings (43.1%).

Regional travelers were the likeliest to describe Billings as crowded, congested and bland/boring. Meanwhile, non-regional travelers were the likeliest to describe Billings as “hard to get to” and “unpopular.”

Question: Which of these words or phrases accurately describe Billings? (Select all that apply) Base: All respondents. 1,384 responses.

Figure 7: Descriptions of Billings—Negative Aided (Detail by Point of Origin)

	Total	Regional Traveler	Non-Regional Traveler
Touristy	14.5%	13.7%	15.5%
Crowded	12.9%	17.0%	7.0%
Bland	12.8%	15.0%	9.6%
Boring	11.5%	12.8%	9.6%
Congested	11.3%	15.7%	5.2%
Hard to get to	10.3%	6.8%	15.4%
Generic	10.2%	11.1%	8.9%
Expensive	9.5%	10.1%	8.7%
Unpopular	7.7%	5.1%	11.3%
Unsafe	6.6%	9.2%	3.0%
Overdeveloped	6.4%	7.2%	5.2%
Backward	4.5%	3.2%	6.3%
Unfriendly	3.5%	3.7%	3.3%
Unwelcoming	3.5%	4.3%	2.4%
NONE OF THESE	43.1%	42.3%	44.2%
Sample Size:	1384	811	573

Importance of Destination Attributes

For both regional and non-regional travelers surveyed, scenic beauty, affordability and restaurants were considered the most important attributes in selecting leisure destinations in the Western U.S. Interestingly though, regional travelers appear to place more importance on scenic beauty (90.9% vs. 83.4%) and affordability (91.0% vs. 82.7%) compared to non-regional travelers. In terms of secondary destination attributes, non-regional travelers placed more importance on family-friendly activities (65.3% vs. 58.6%) and urban sightseeing/exploration (63.7% vs. 46.6%).

Question: Please think carefully about how you usually approach selecting the places you visit for leisure in the Western region of the U.S. In general, how important are each of the following to how you select the places you visit? Base: All respondents. 1,384 responses.

Figure 8: Importance of Destination Attributes (Detail by Point of Origin)

(Top-two box score – percent saying each attribute is “important” or “extremely important” to selecting leisure destinations in the Western U.S.)

	Total	Regional Travelers	Non-Regional Travelers
Scenic beauty	87.8%	90.9%	83.4%
Affordability	87.6%	91.0%	82.7%
Restaurants and food	75.7%	74.2%	77.7%
Historic sites & attractions	73.1%	74.6%	71.0%
Iconic or famous attractions	65.8%	63.9%	68.6%
Family-friendly activities	61.3%	58.6%	65.3%
Outdoor recreation activities (horseback riding, biking, hiking, etc.)	57.7%	57.5%	57.9%
Off the beaten path ambiance	56.4%	55.4%	57.8%
Urban/city sightseeing and exploration	53.7%	46.6%	63.7%
Festivals/special events	51.4%	48.5%	55.5%
Arts & cultural attractions	51.3%	47.3%	56.9%
Good shopping options	46.7%	40.1%	56.2%
Craft breweries/distilleries/wineries	32.0%	26.0%	40.5%
Nightlife options	31.4%	24.2%	41.5%
Live music	30.6%	24.7%	39.1%
Sample Size:	1384	811	573

Rating of Billings' Attributes

Perceptions of Billings' destination attributes differ between regional and non-regional travelers. Regional travelers were much more likely to rate Billings' highly for its restaurants and food (71.1% vs. 56.7%) and good shopping options (58.3%). Meanwhile, non-regional travelers were more likely to rate Billings' highly for scenic beauty (75.2% vs. 64.0%), outdoor recreation activities (72.6% vs. 64.5%), historic attractions (60.9% vs. 57.0%), off the beaten path ambiance (66.3% vs. 42.2%), iconic attractions (50.1% vs. 37.5%) and urban sightseeing/exploration (46.9% vs. 36.3%).

Question: Please use the scale below to evaluate each attribute of Billings, MT as a place to visit for leisure travel. Even if you are unfamiliar with Billings, please answer this question based on the impressions or feelings you do have about the city. Base: All respondents. 1,384 responses.

Figure 9: Rating of Billings' Attributes (Detail by Point of Origin)

(Top-two box score – percent saying each attribute is “good” or “very good” in Billings)

	Total	Regional Travelers	Non-Regional Travelers
Scenic beauty	68.6%	64.0%	75.2%
Outdoor recreation activities (horseback riding, biking, hiking, etc.)	67.8%	64.5%	72.6%
Restaurants and food	65.2%	71.1%	56.7%
Family-friendly activities	62.0%	61.2%	63.2%
Affordability	60.5%	59.6%	62.0%
Historic sites & attractions	58.6%	57.0%	60.9%
Good shopping options	53.6%	58.3%	46.9%
Off the beaten path ambiance	52.2%	42.2%	66.3%
Festivals/special events	47.7%	46.2%	49.7%
Arts & cultural attractions	44.9%	42.2%	48.7%
Iconic or famous attractions	42.7%	37.5%	50.1%
Urban/city sightseeing and exploration	40.7%	36.3%	46.9%
Craft breweries/distilleries/wineries	40.2%	38.6%	42.6%
Live music	36.7%	33.9%	40.7%
Nightlife options	33.7%	30.6%	38.0%
Sample Size:	1384	811	573

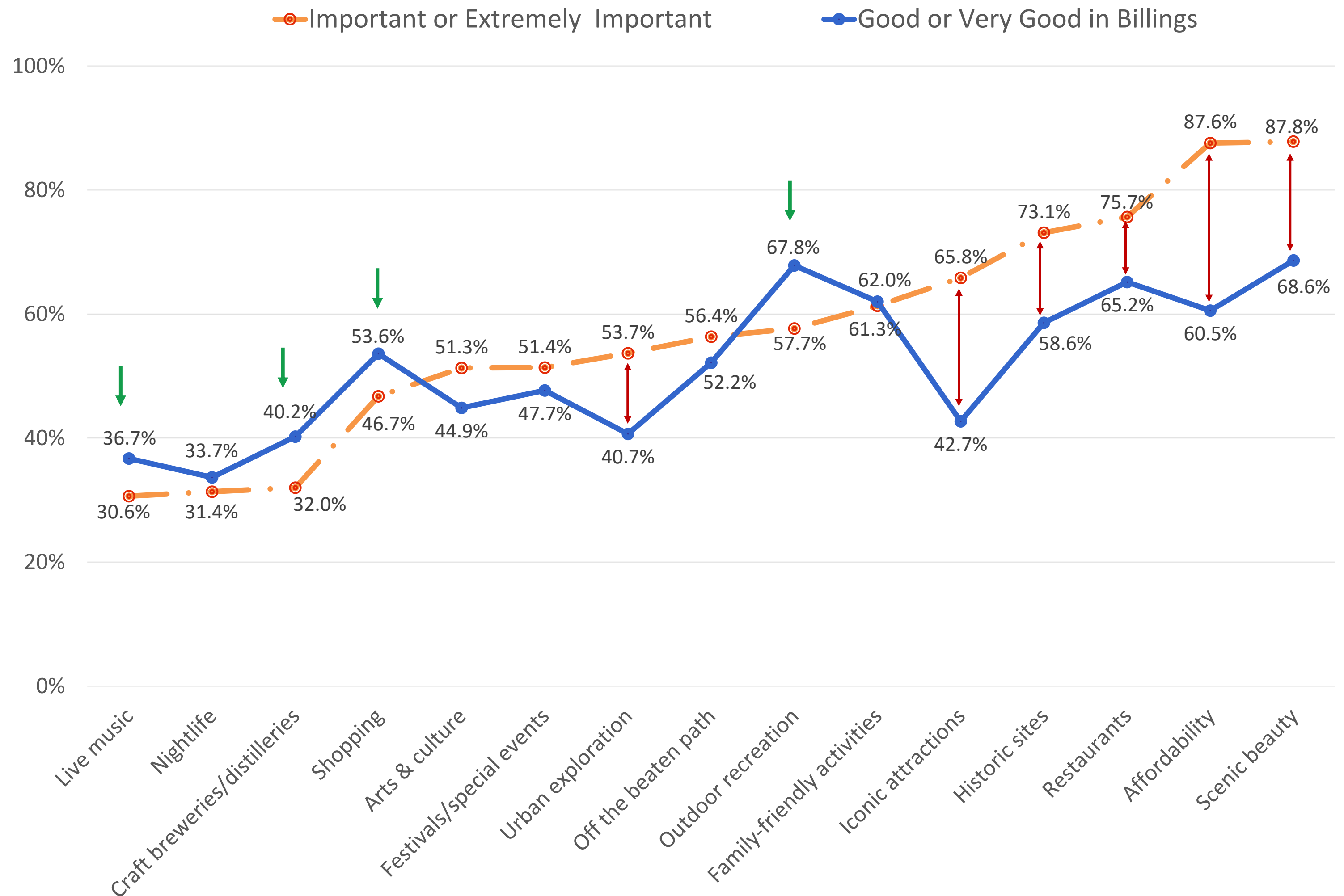
Importance of Destination Attributes vs. Rating of Billings' Attributes

Billings performs above average or on par for the destination attributes that are considered least important to the destination decision process but underperforms for the most important to travelers surveyed. The chart at right maps the percent of travelers who rated each attribute “important” or “extremely important” to selecting leisure destinations in the Western U.S. (orange line) against the percent who rated each attribute as “good” or “very good” in Billings (blue line). All attributes in blue that are above the orange line illustrate that Billings performs well—outpacing the volume of travelers in which these attributes are considered important. As highlighted by the green arrows, Billings performs well for outdoor recreation activities, shopping, craft breweries, nightlife and live music. However, these attributes are relatively less important to the destination choice.

As highlighted by the red arrows, Billings performs sub-par for the top five attributes that are important in selecting leisure destinations in the west; scenic beauty, affordability, restaurants, historic sites and iconic attractions. Educating travelers about Billings’ assets in these areas should be a high priority in its marketing messaging.

Questions: 1. Please use the scale below to evaluate each attribute of Billings, MT as a place to visit for leisure travel. Please think carefully about how you usually approach selecting the places you visit for leisure in the Western region of the U.S. 2. In general, how important are each of the following to how you select the places you visit? Base: All respondents. 1,384 responses.

Figure 10: Importance of Destination Attributes vs. Rating of Billings' Attributes



Deterrents to Visiting Billings

Deterrents to visiting Billings differs between regional and non-regional travelers. Regional travelers were much more likely to say they have more interest in other destinations (43.6% vs. 26.5%) and/or personal financial reasons (27.3% vs. 18.7%) are keeping them from visiting Billings more often. Meanwhile, non-regional travelers were more likely to feel they don't know enough about the destination (30.5% vs. 16.6%) and/or that airfare is too expensive (21.1%).

Figure 11: Deterrents to Visiting Billings

	Total	Regional Travelers	Non-Regional Travelers
I have more interest in other destinations	36.6%	43.6%	26.5%
Personal financial reasons	23.7%	27.3%	18.7%
Travel time/distance to get to	23.3%	24.2%	22.2%
I don't know enough about Billings as a travel destination	22.4%	16.6%	30.5%
I am too busy at work	19.4%	21.5%	16.6%
Billings does not fit the travel experience I seek	18.2%	18.1%	18.3%
Gasoline is too expensive	17.8%	20.3%	14.3%
Not enough vacation time	15.8%	15.9%	15.5%
Airfare is too expensive	10.9%	3.7%	21.1%
There aren't enough activities and attractions	9.8%	12.1%	6.6%
Weather	6.5%	7.2%	5.6%
Lack of buzz	6.2%	5.1%	7.9%
Safety concerns	4.6%	4.7%	4.5%
It isn't urban enough	4.1%	1.7%	7.5%
Base	1384	811	573

Question: Which best describes your reasons for not visiting Billings more often?
(Select all that apply) Base: All respondents. 1,384 responses.

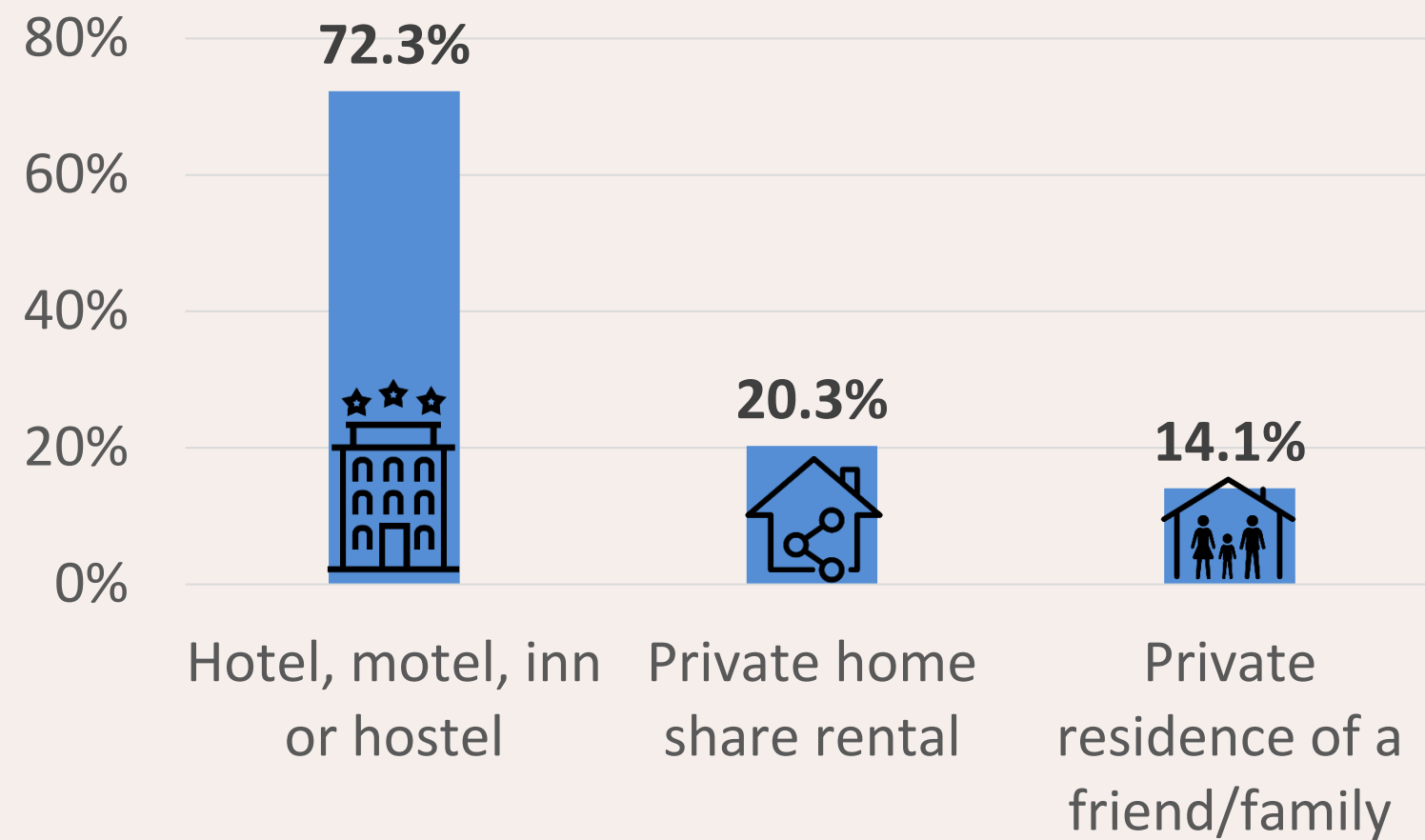
REGIONAL & NON-REGIONAL TRAVELERS: THE IDEAL BILLINGS TRIP

SOURCE: BILLINGS NATIONAL/REGIONAL TRAVELER STUDY

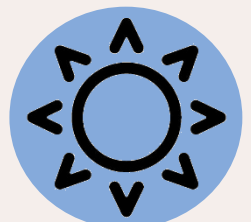
REGIONAL TRAVELERS: IDEAL BILLINGS TRIP

Travelers who reside within a 500-mile radius from Billings, excluding Yellowstone County residents

Likely Place of Stay in Billings



Key Trip Details

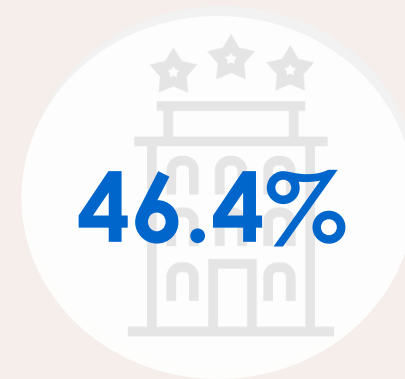


The average regional traveler would likely stay **2.4 days** in the Billings area

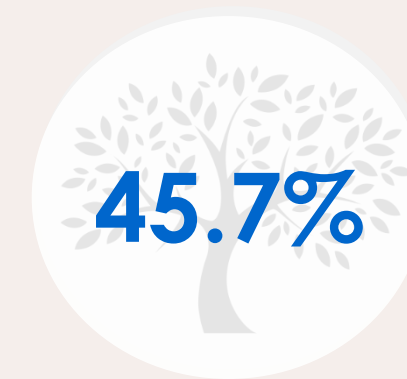


They anticipate spending **\$192.26** in-market per day

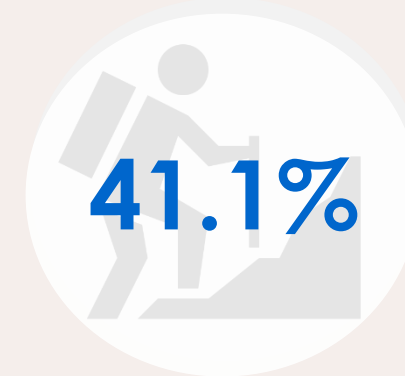
Important Factors Motivating Trip to Billings



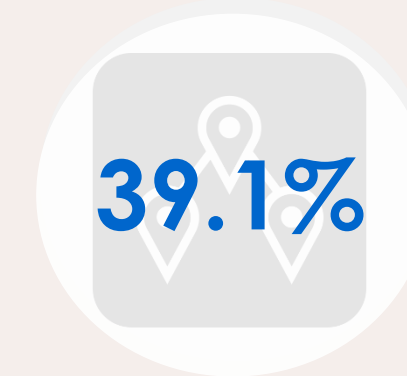
Good Hotel Rate



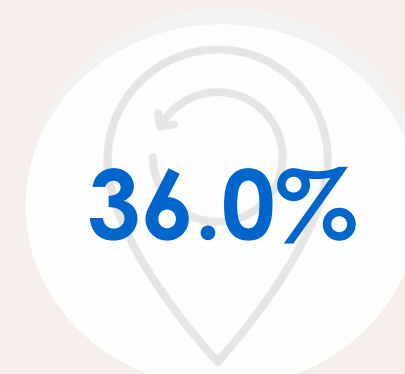
Scenic Beauty



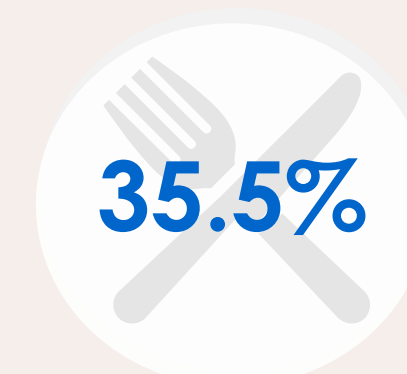
Outdoor Activities



Area Attractions

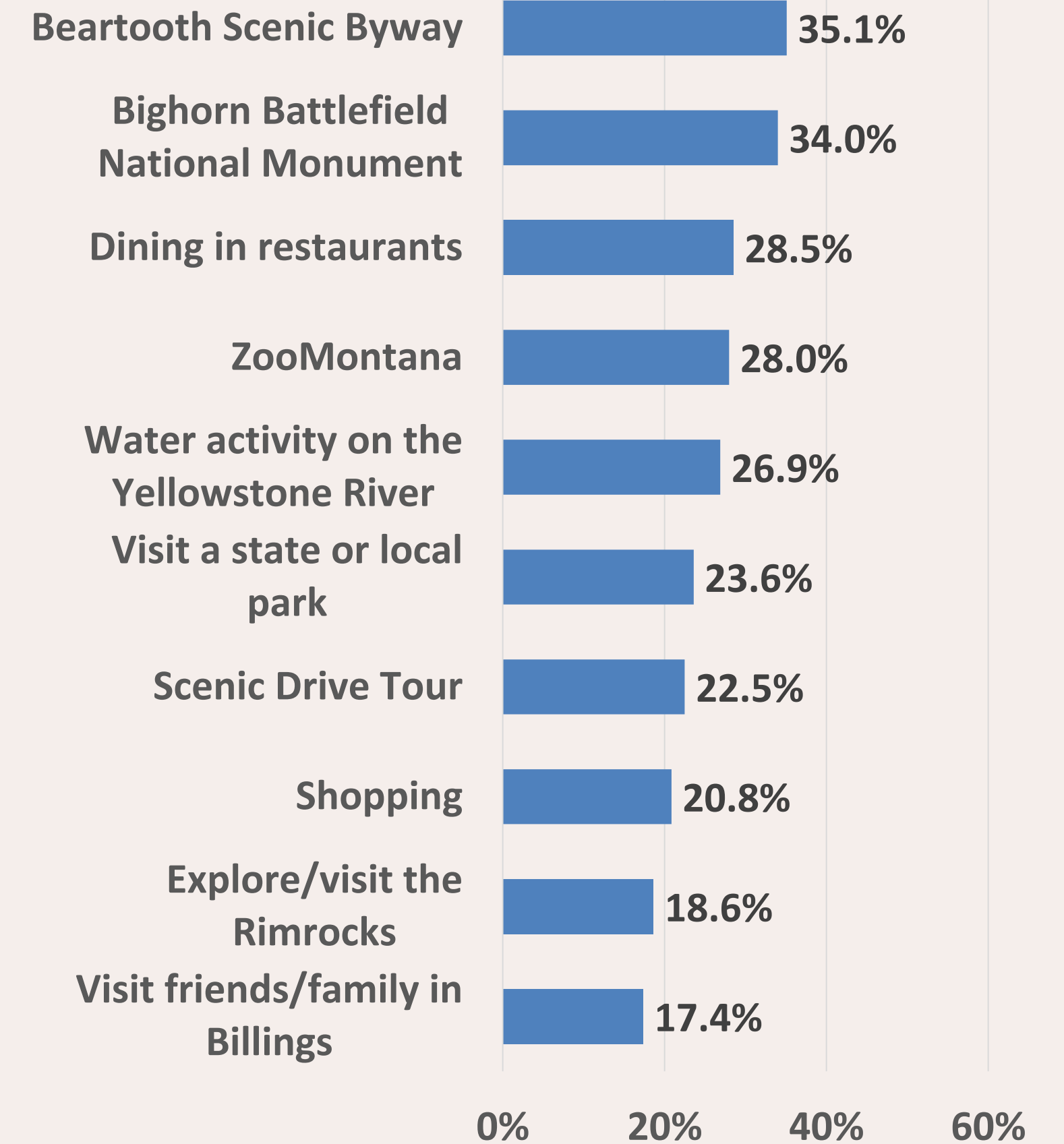


Historic sites



Restaurants

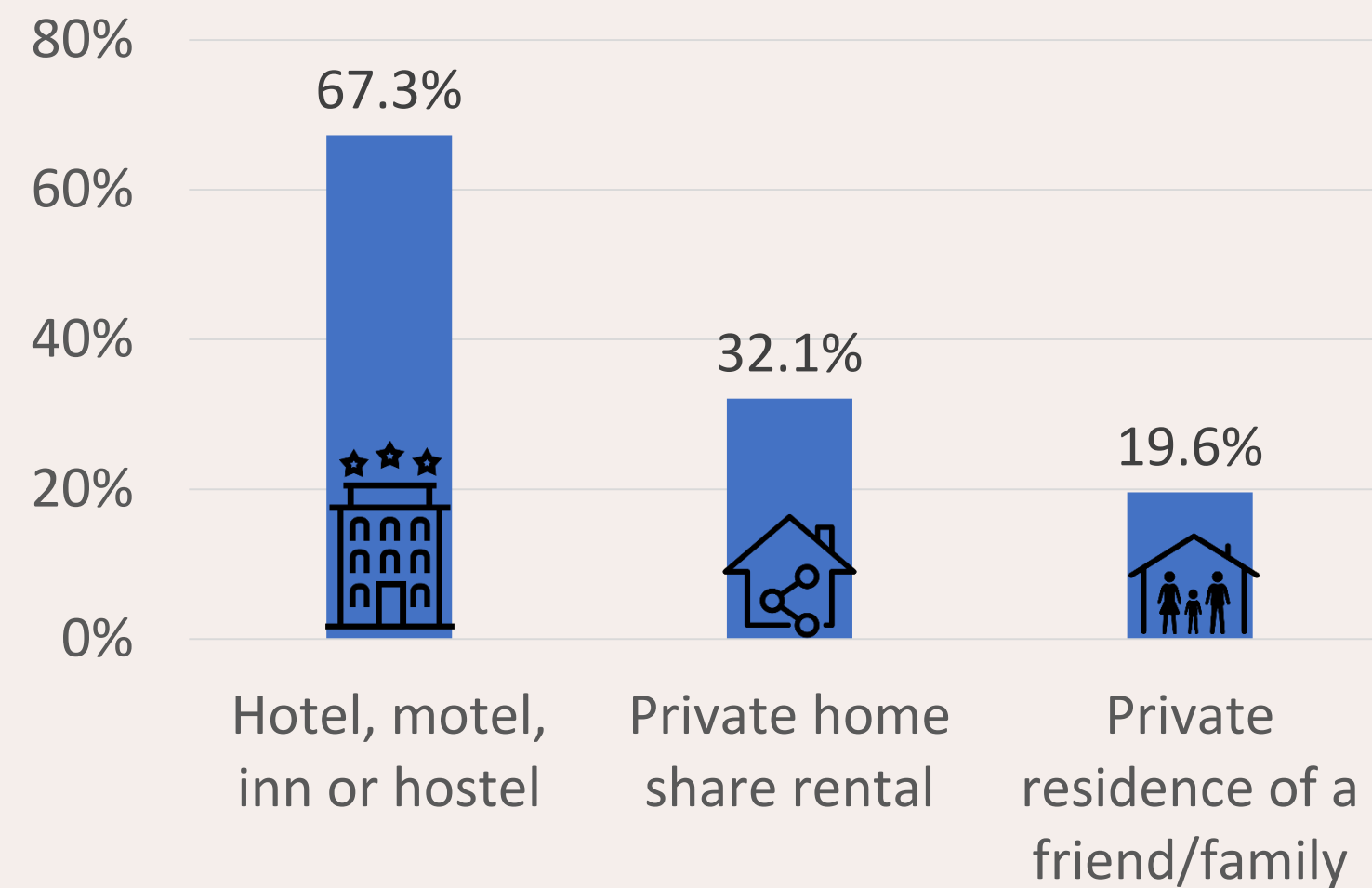
Top 10 Activities of Interest



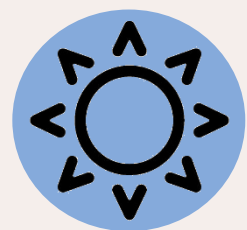
NON-REGIONAL TRAVELERS: IDEAL BILLINGS TRIP

Travelers who reside outside a 500-mile radius from Billings

Likely Place of Stay in Billings



Key Trip Details

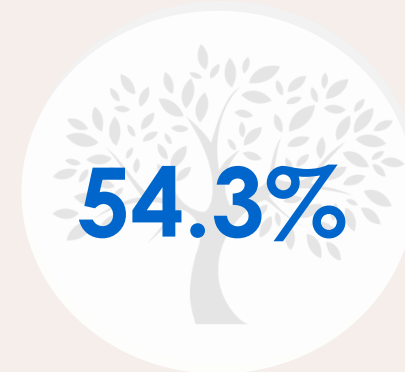


The average National traveler would likely stay **3.6 days** in the Billings area

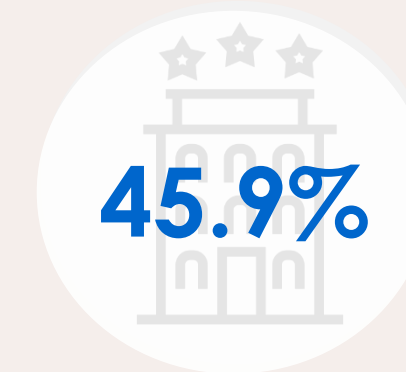


They anticipate spending **\$245.69** in-market per day

Important Factors Motivating Trip to Billings



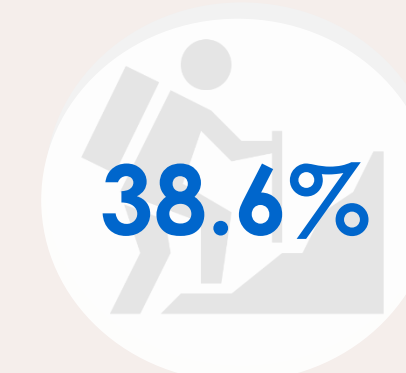
Scenic Beauty



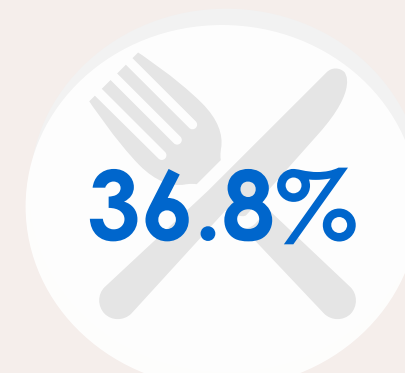
Good Hotel Rate



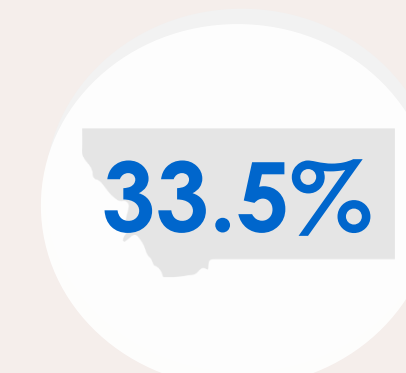
Area Attractions



Outdoor Activities

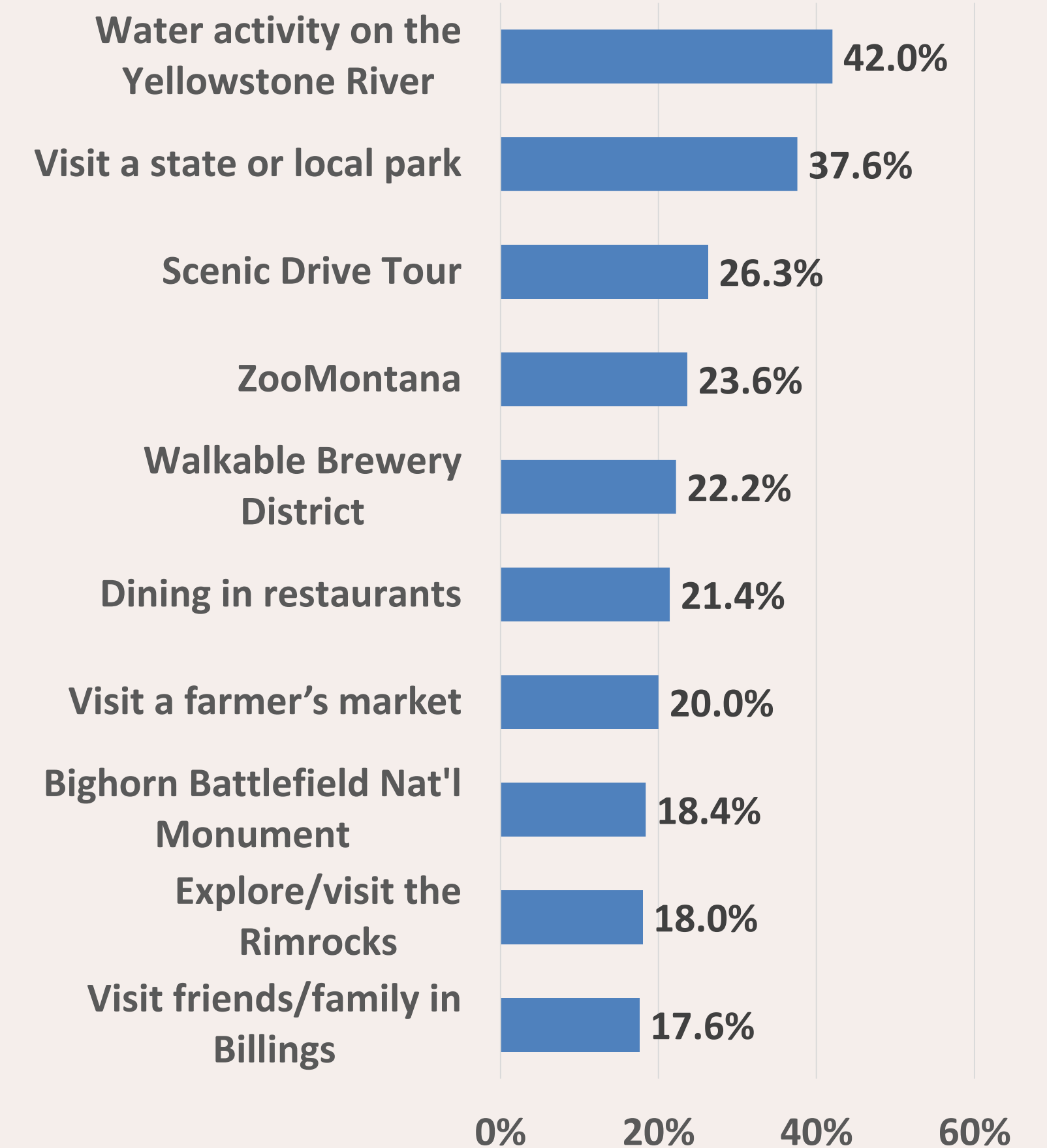


Restaurants



Big Sky Country

Top 10 Activities of Interest



An aerial photograph of a city, likely Boise, Idaho, showing a mix of urban buildings and a large area of trees with autumn foliage. In the background, there are rolling hills under a clear sky. The text 'ECONOMIC IMPACT ANALYSIS' is overlaid in the center of the image.

ECONOMIC IMPACT ANALYSIS

Economic Impact: Definitions

The economic impact results presented in this report were developed using Destination Analysts' proprietary economic impact model for destinations. This model produces annual economic impact estimates (in this case 2017/18) and uses data inputs from multiple sources. These sources include proprietary research (1-2 below) commissioned by Visit Billings, and a variety of secondary data sources. Six main sources are used:

1. Billings Visitor Intercept Survey
2. Billings Survey of Travelers – Regional and National
3. Billings Meetings Impact Survey
4. Data from federal, state and city government statistical agencies
5. STR citywide hotel inventory and occupancy estimates
6. Implan multipliers and jobs supported estimates

The model used here is based on an industry-standard modeling approach for estimating direct visitor spending in the destination. This is defined as all spending by visitors to Billings during the period of study (May 2017 through April 2018). In short, the model uses various sources to make detailed estimates of visitor volume and visitor days spent in the destination. To these estimates are applied estimates of per day spending developed directly from the survey data collected for this study. Implan multipliers were then used to estimate the overall economic impact of tourism to the local economy.

The model also estimates additional metrics related to the visitor industry's economic impact to the community. These are tax revenues generated for Billings, and jobs supported by the industry.

Visitor Industry Economic Impact Calculation

The following key definitions are used in this report.

- **Visitor:** A person visiting Billings who lives outside the city and is not in the city on routine personal business or work. The model used here estimates the number of visitors to Billings based on their place of stay. These include visitors staying in Billings hotels, private homes, vacation rentals, campgrounds and RV parks. Day trip visitors (not as part of their routine daily life) are also included.
- **Total direct visitor spending:** The injection of money into the local economy that takes place when a visitor purchases any good or service inside Billings.
- **Economic impact of the visitor industry:** The total change in economic activity in Billings generated by visitors' direct spending in Billings. This includes direct visitor spending as well its induced and indirect effects in the local economy.
- **Visitor days:** The total number of person days spent in Billings by visitors. This is effectively the number of visitors multiplied by their average length of stay in the destination.
- **Tax revenues generated:** Tax revenues flowing to Billings' city government coffers as a result of direct visitor spending.
- **Jobs supported:** The number of jobs supported by direct visitor spending in Billings. These jobs may or may not be physically located in the destination and also may not be in jobs traditionally identified as tourism jobs. For example, restaurant spending supports many types of jobs such as delivery persons and linen cleaners. We may not think of these as tourism jobs, but the industry nevertheless supports them.
- **Indirect effects:** Changes in inter-industry transactions when supplying industries respond to increased demands from the directly affected industries (e.g., impacts from non-wage expenditures).
- **Induced effects:** Changes in local spending that result from income changes in the directly and indirectly affected industry sectors (e.g., impacts from wage expenditures; the subsequent round of spending in the local economy made by the households of the employees of companies that incur both direct and indirect expenditures).

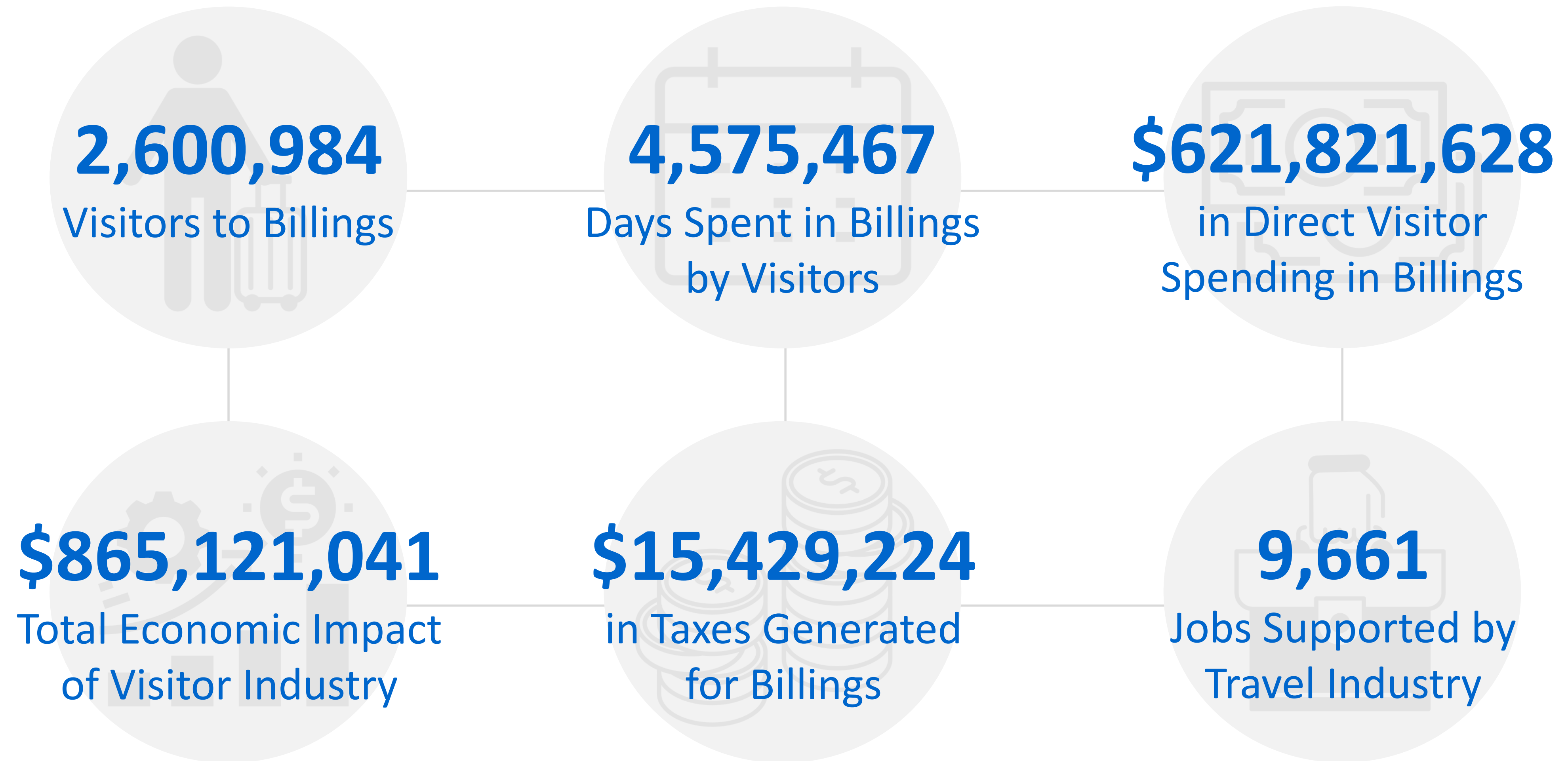
Economic Impact Key Findings

A brief summary of economic impact statistics generated in this study follows:

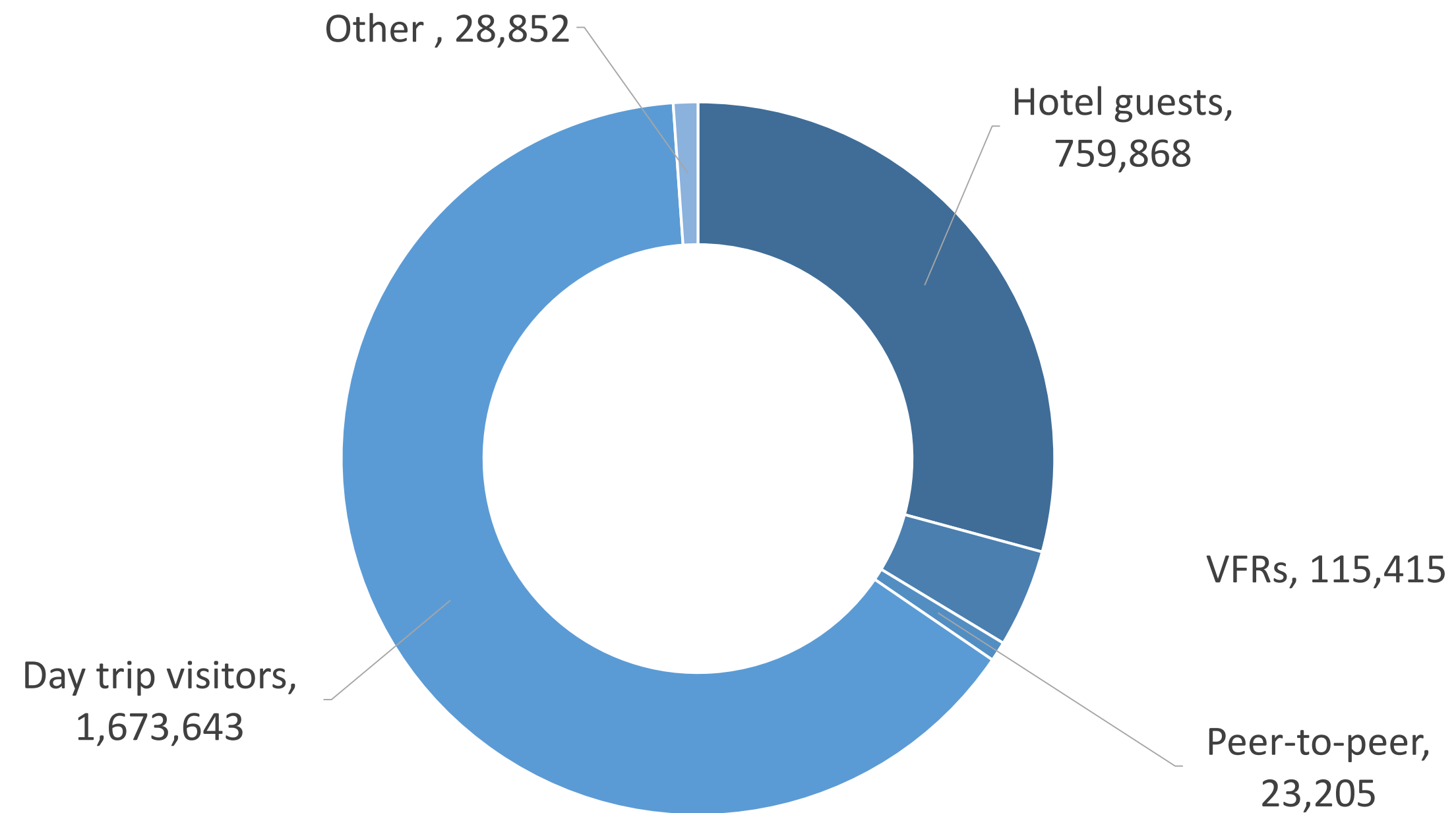
- **Visitor volume.** The city of Billings, Montana hosted over 2.6 million visitors in the 2017/18 period of study. The majority of these visitors are day trip visitors (64.3%). Just under 30 percent of Billings visitors stay overnight in a local hotel, motel or inn (29.2%).
- **Direct Visitor Spending.** Visitors spent over \$621 million in Billings during the period. This amounts to \$1.7 million directly injected into the local economy daily. The three largest types of spending are: retail establishments (25.9%), hotels (21.0%) and restaurants (19.6%).
- **Economic Impact.** Using an IMPLAN economic impact model, it is estimated that the overall economic impact to Billings of the visitor industry was \$865.1 million. This figure includes the indirect and induced effects of visitor spending in Billings during the year.
- **Employment impact.** Visitor spending supports jobs. In total, 9,661 jobs are supported by direct visitor spending in Billings. The two biggest employer industries are restaurants (2,268 jobs) and hotels and lodging (1,479 jobs).
- **Tax generation.** Visitor spending generates significant tax revenues for the city, totaling an estimated \$15.4 million annually. These taxes include the transient occupancy tax, property taxes and TBID assessment collections.

Key Visitor Industry Statistics, 2017/18

The profile below shows a summary of key economic statistics emerging from this research.



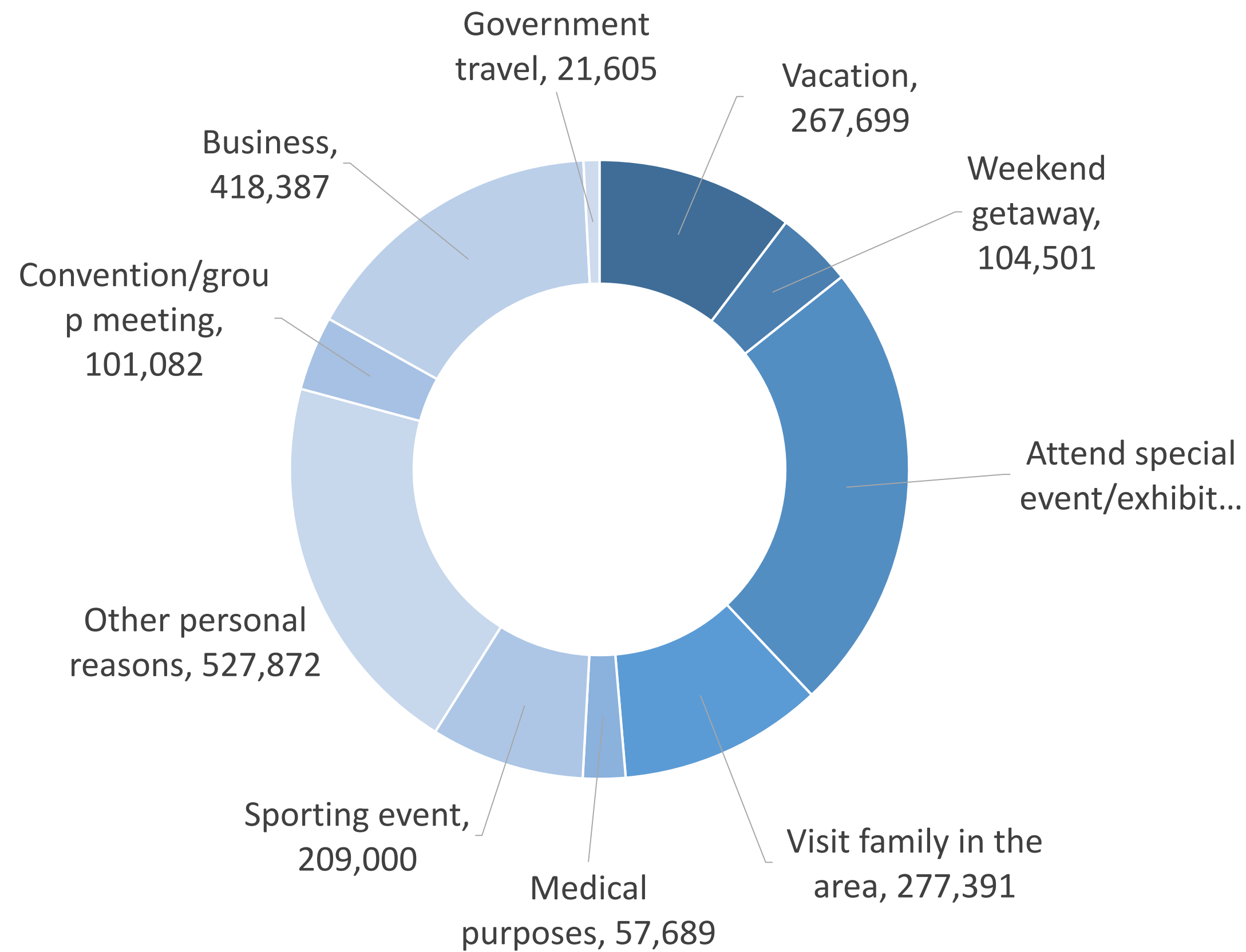
Visitor Volume – by Type of Visitor



Visitor Volume – by Type of Visitor

Hotel guests	759,868
VFRs	115,415
Peer-to-peer	23,205
Day trip visitors	1,673,643
Other	28,852
TOTAL VISITORS	2,600,984

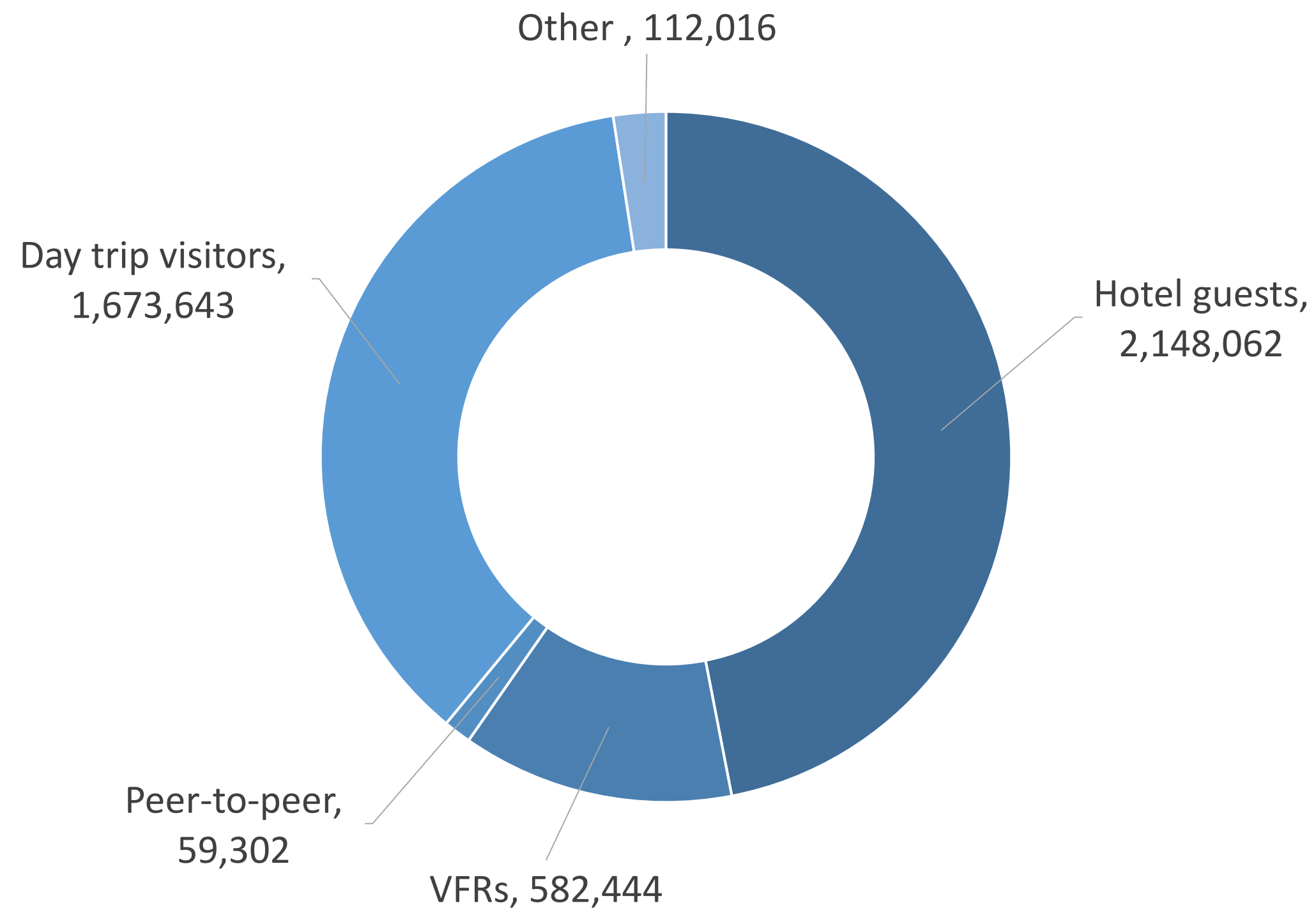
Visitor Volume – by Type of Trip



Visitor Volume – by Type of Trip

Vacation	267,699
Weekend getaway	104,501
Attend special event/exhibition/concert	615,757
Visit family in the area	277,391
Medical purposes	57,689
Sporting event	209,000
Other personal reasons	527,872
Convention/group meeting	101,082
Business	418,387
Government travel	21,605
TOTAL VISITORS	2,600,984

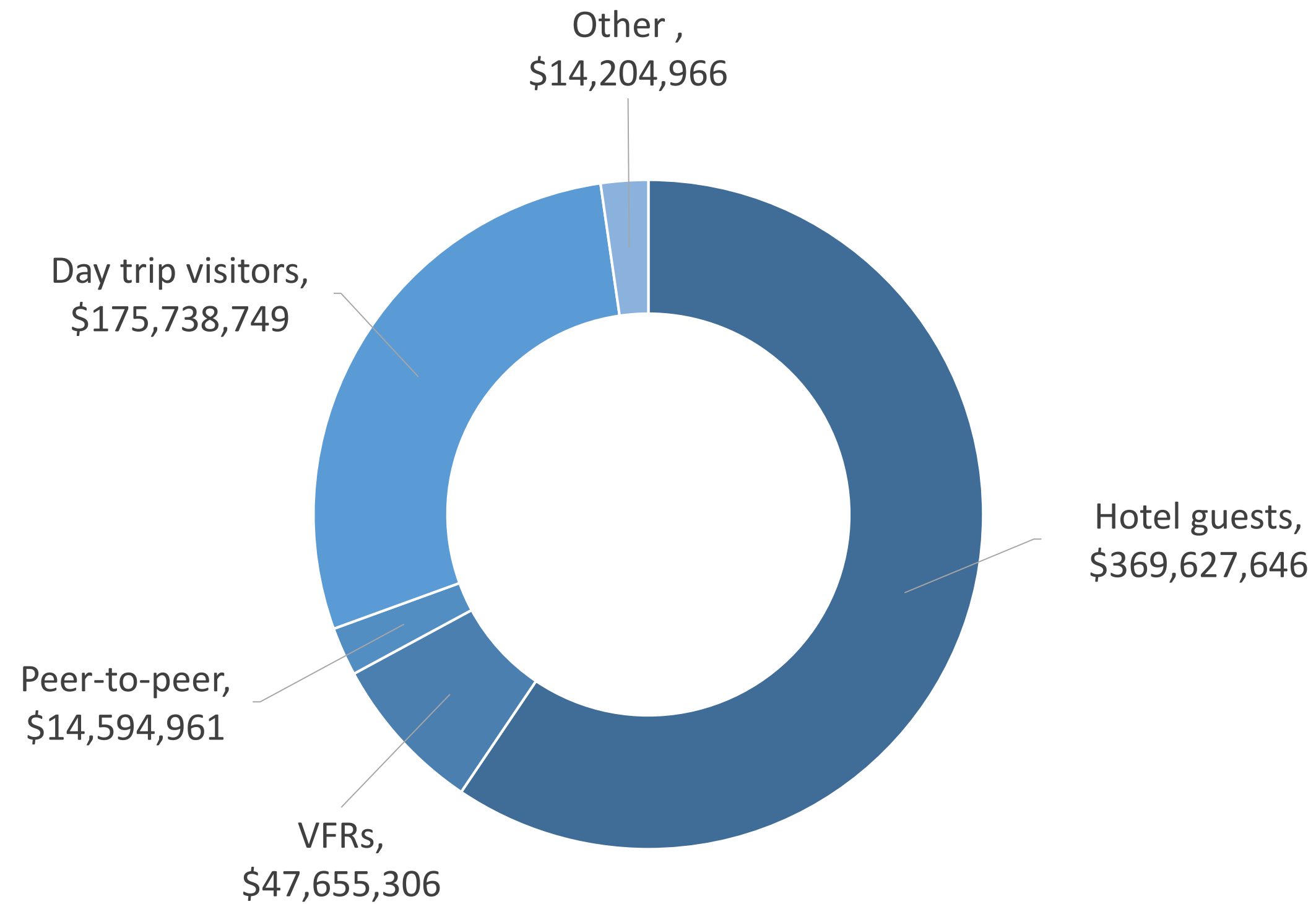
Visitor Days – by Type of Visitor



Visitor Days – by Type of Visitor

Hotel guests	2,148,062
VFRs	582,444
Peer-to-peer	59,302
Day trip visitors	1,673,643
Other	112,016
TOTAL VISITOR DAYS	4,575,467

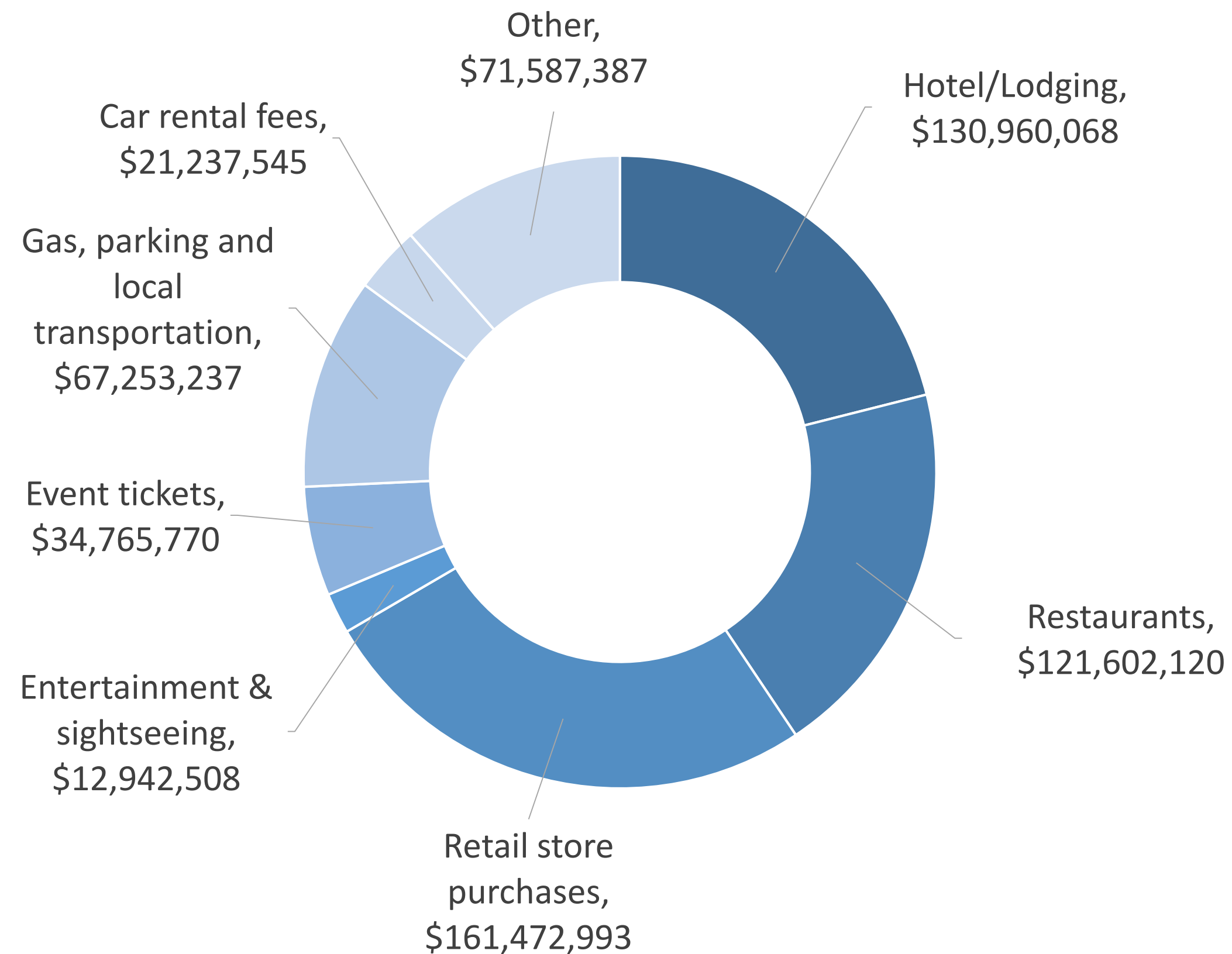
Direct Visitor Spending – by Type of Visitor



Direct Visitor Spending – by Type of Visitor

Hotel guests	\$369,627,646
VFRs	\$47,655,306
Peer-to-peer	\$14,594,961
Day trip visitors	\$175,738,749
Other	\$14,204,966
TOTAL VISITOR SPENDING	\$621,821,628

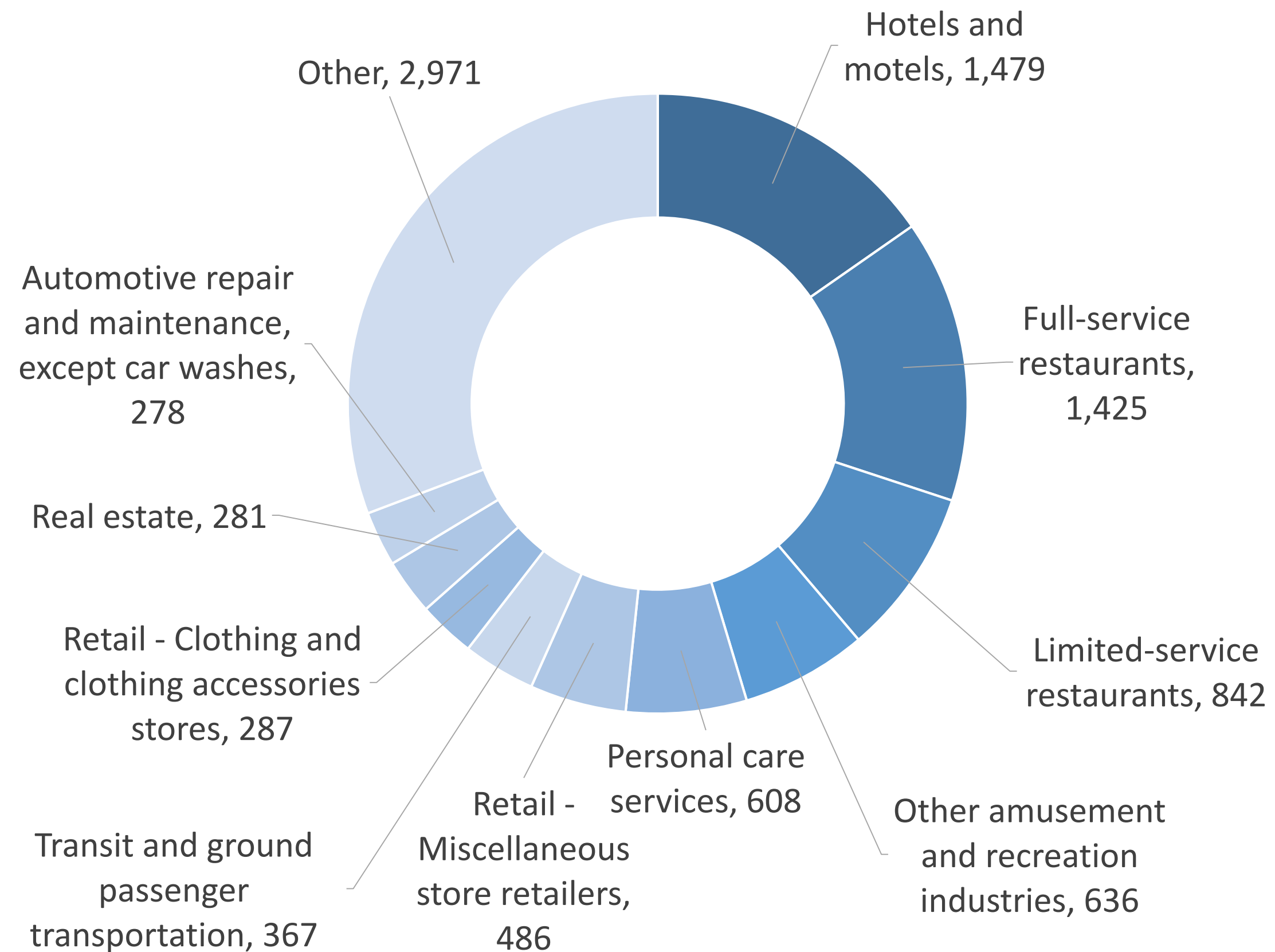
Direct Visitor Spending – by Type of Spending



Direct Visitor Spending – by Type of Spending

Hotel/Lodging (before tax):	\$130,960,068
Restaurants (including in your hotel):	\$121,602,120
Retail store purchases:	\$161,472,993
Entertainment & sightseeing:	\$12,942,508
Event tickets:	\$34,765,770
Gas, parking and local transportation:	\$67,253,237
Car rental fees	\$21,237,545
Other:	\$71,587,387
TOTAL VISITOR SPENDING	\$621,821,628

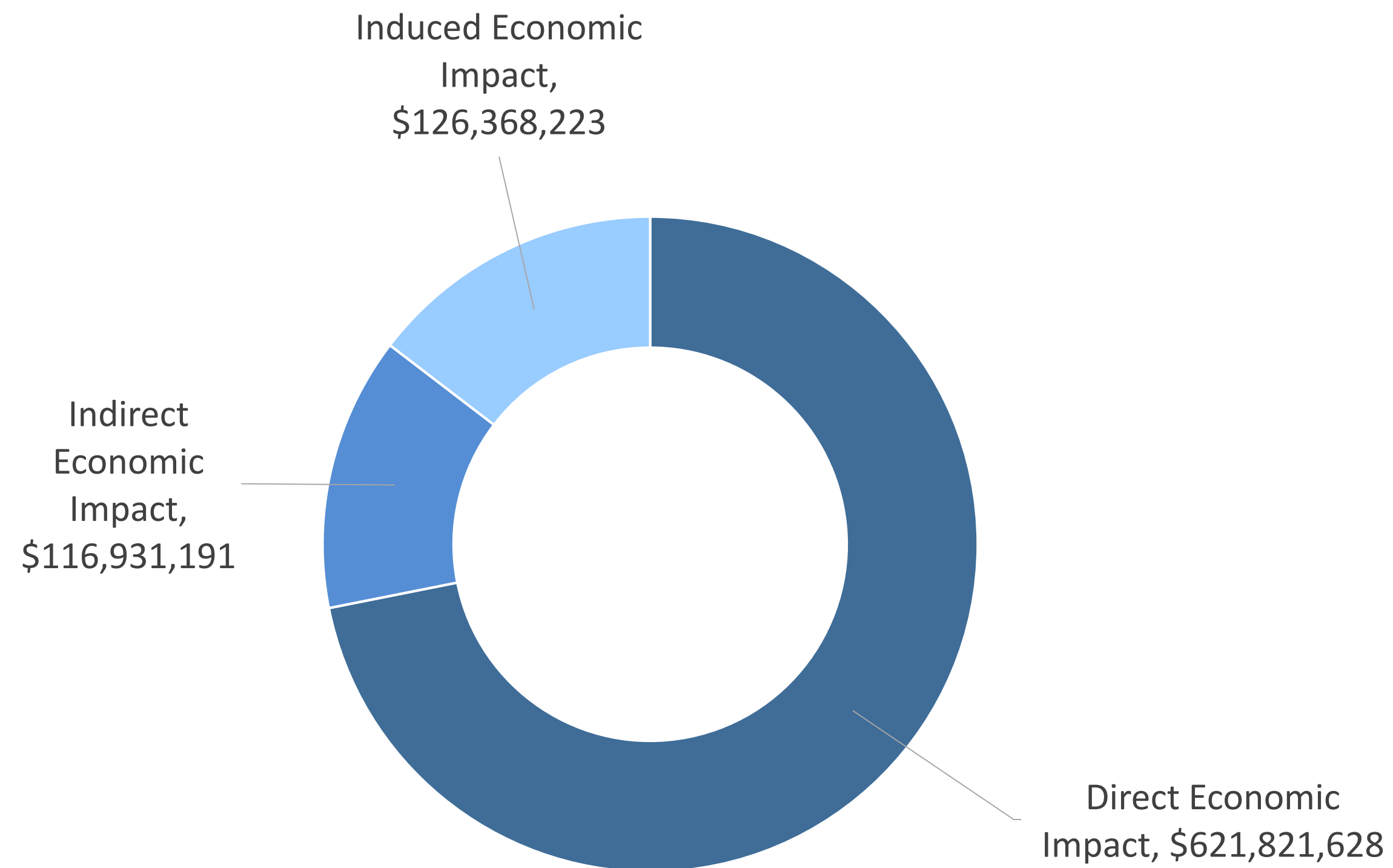
Jobs Supported



Jobs Supported

Hotels and motels	1,479
Full-service restaurants	1,425
Limited-service restaurants	842
Other amusement and recreation industries	636
Personal care services	608
Retail - Miscellaneous store retailers	486
Transit and ground passenger transportation	367
Retail - Clothing and clothing accessories stores	287
Real estate	281
Automotive repair and maintenance, except car washes	278
Other	2,971
TOTAL JOBS SUPPORTED	9,661

Total Economic Impact



Total Economic Impact

Direct Economic Impact	\$621,821,628
Indirect Economic Impact	\$116,931,191
Induced Economic Impact	\$126,368,223
TOTAL ECONOMIC IMPACT	\$865,121,041



THE BILLINGS VISITOR

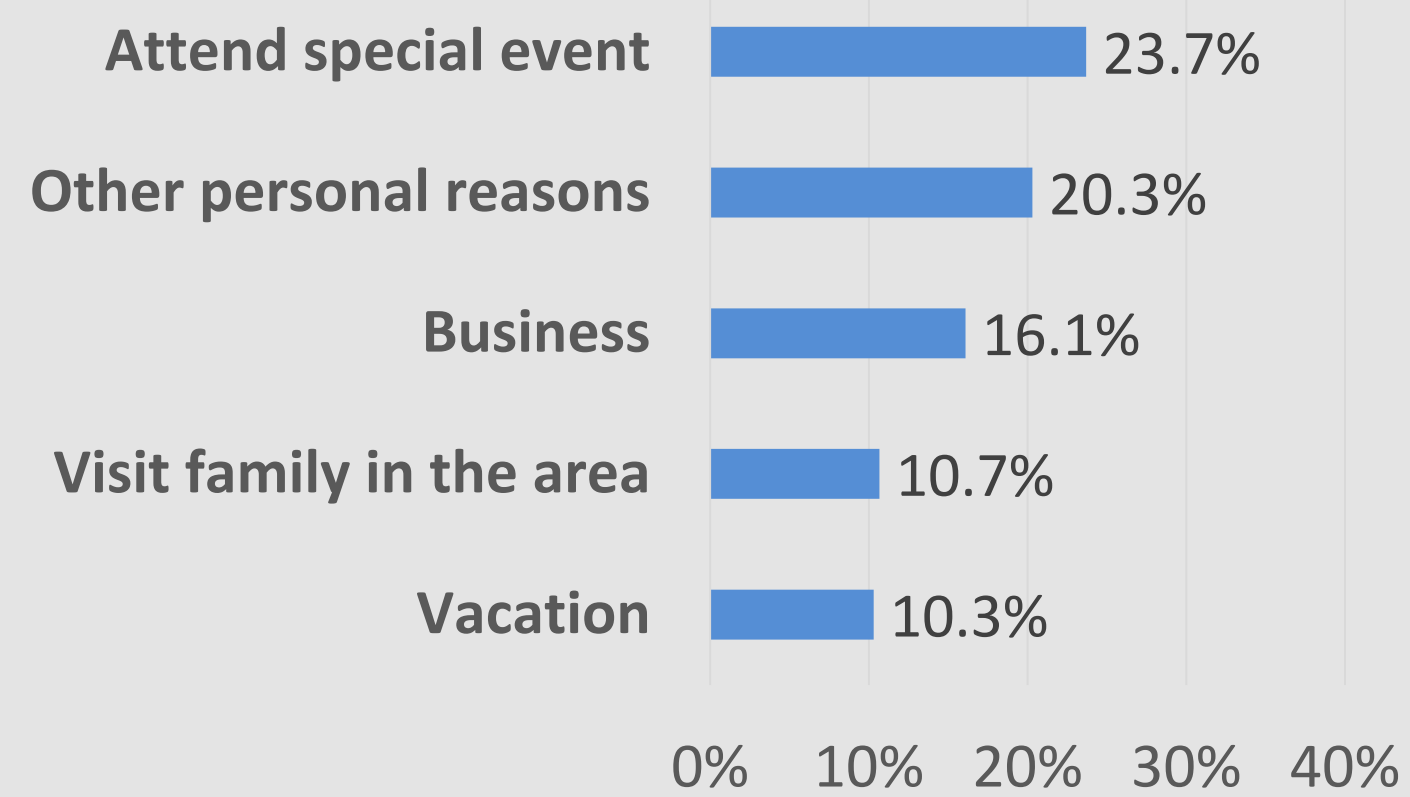
SOURCE: 2017/18 BILLINGS VISITOR PROFILE STUDY

INFOGRAPHIC SUMMARY OF THE BILLINGS VISITOR

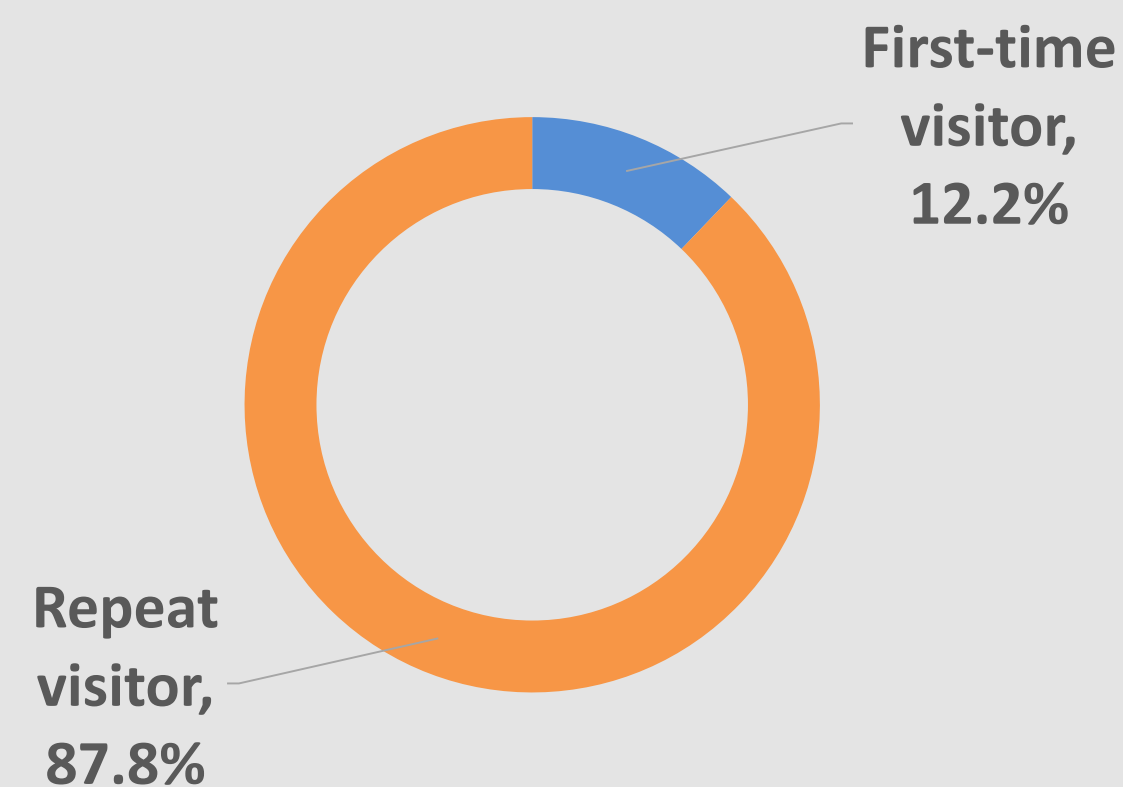
2017-18 BILLINGS VISITOR PROFILE

Visit Billings – 2017/2018 Billings Visitor Profile – Final Report of Findings

Top Reasons for Visiting



Past Visitation



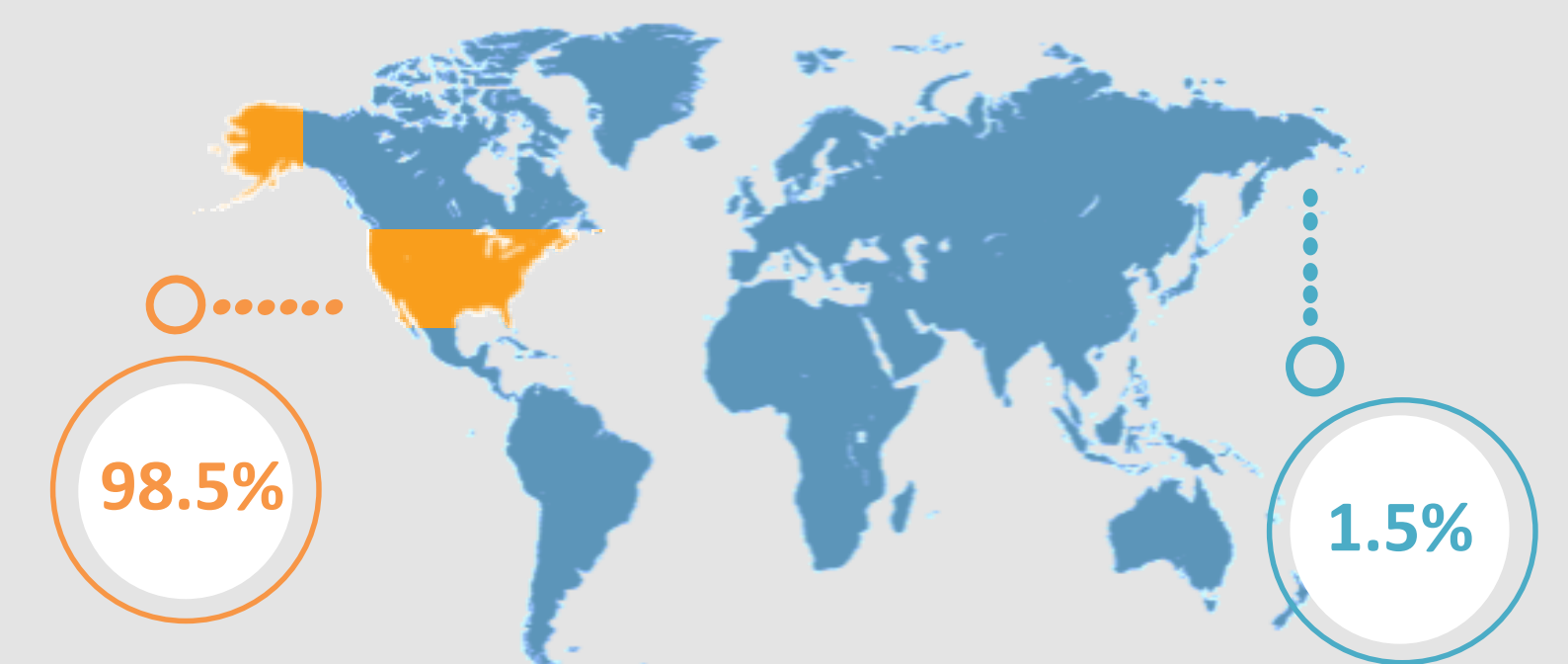
Important Factors Motivating Trip to Billings



Key Trip Details



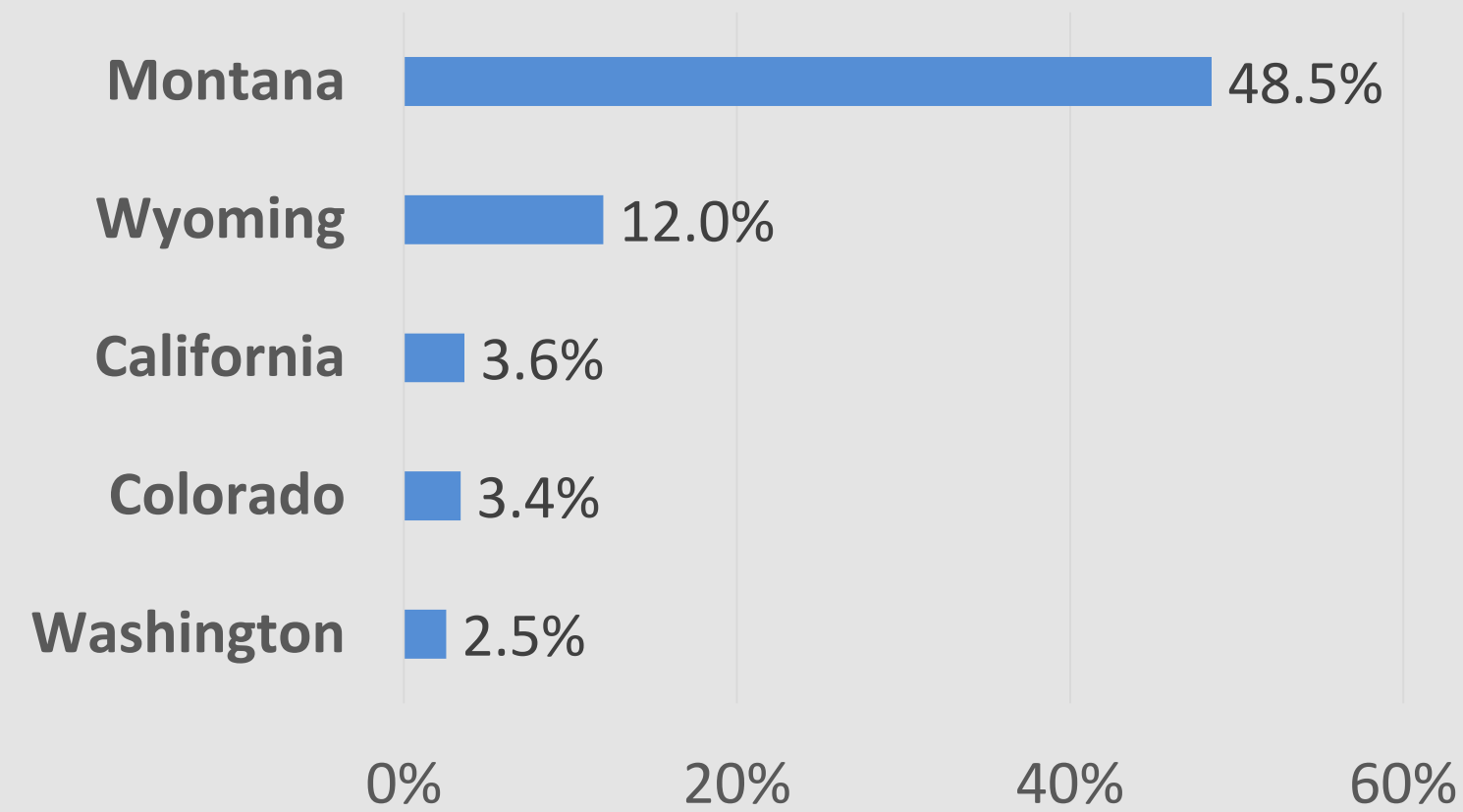
Domestic vs. International Visitors



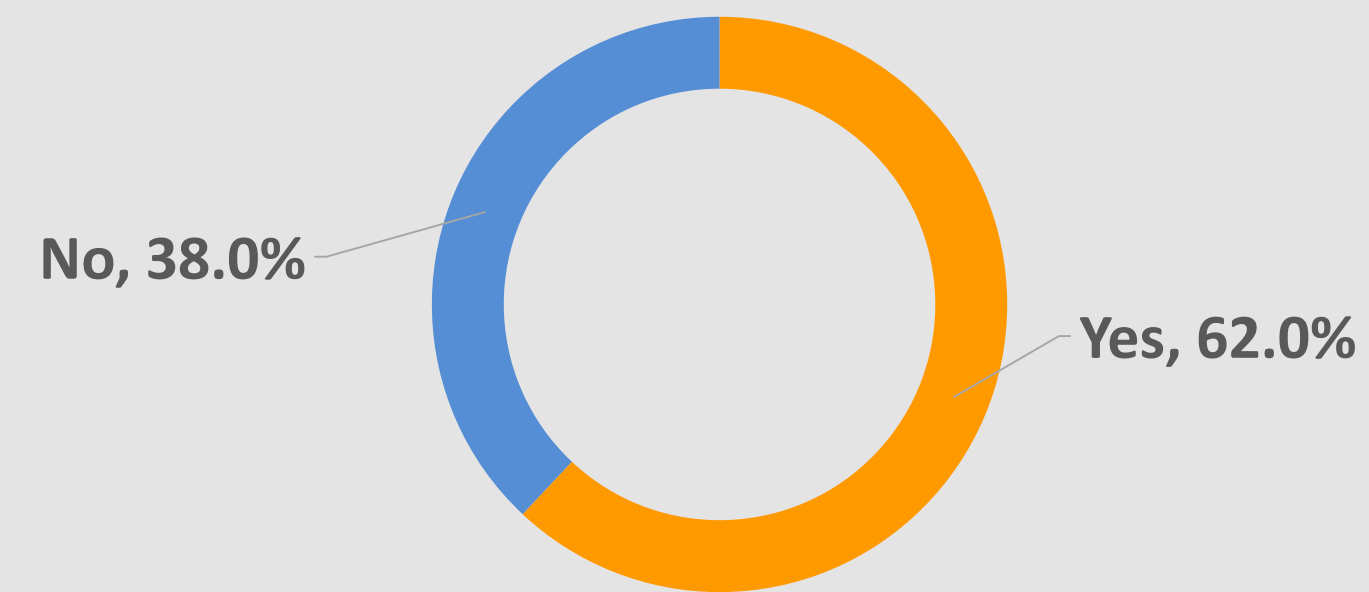
2017-18 BILLINGS VISITOR PROFILE

Visit Billings – 2017/2018 Billings Visitor Profile – Final Report of Findings

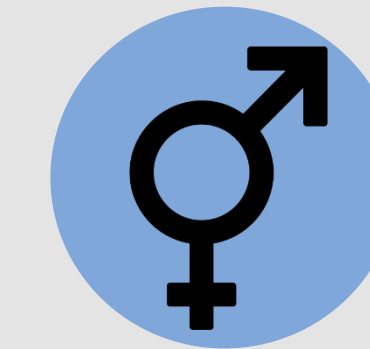
Visitor Point of Origin: Top States



Billings Sole Destination of Trip



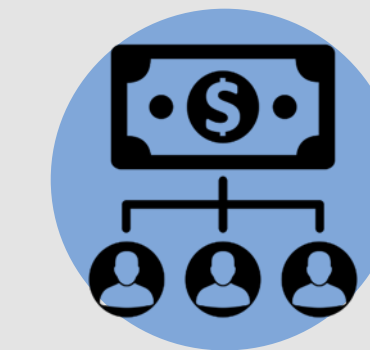
Demographics



Male – 49.5%
Female – 47.7%



Mean Age – 50.4



Mean Household
Income – \$97,210



Married/partnered –
68.4%

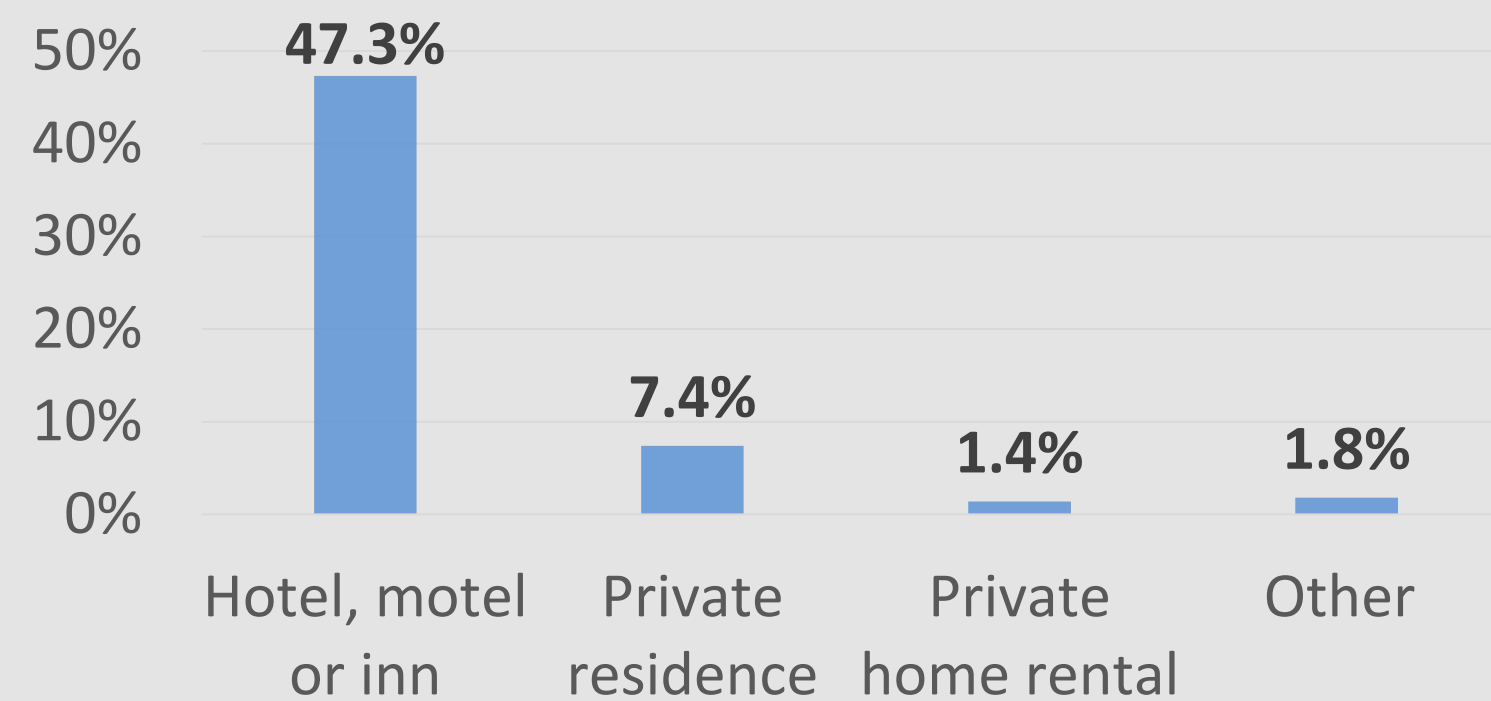


Caucasian ethnicity – 82.9%
Non-Caucasian ethnicity – 12.2%



Heterosexual – 84.3%
LGBTQ – 1.8%

Place of Stay in Billings



Likelihood to Recommend Billings



96.3% of visitors surveyed were
“**Certain to**” (13.3%), “**Very likely**” (59.3%) or
“**Likely**” (23.7%) to recommend visiting Billings

PROFILE SUMMARIES OF BILLINGS VISITORS



THE HOTEL GUEST VISITOR

Results presented here are reflective of visitors who stayed overnight in a hotel in Billings during their trip.

Hotel Stay Details



Mean spend on lodging daily – **\$111.36**

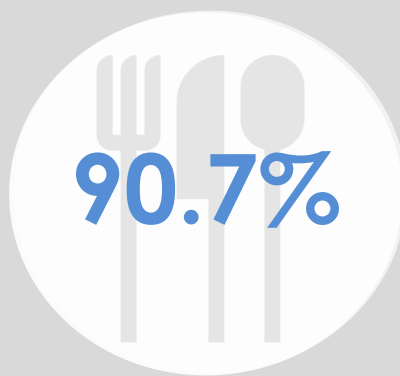


Mean # of people in hotel room – **2.5**

Point of Origin: Top States

- | | |
|----------------------|---------------------|
| 1. Montana (31.1%) | 6. N. Dakota (4.0%) |
| 2. California (6.6%) | 7. Texas (3.4%) |
| 3. Wyoming (6.1%) | 8. Arizona (2.5%) |
| 4. Washington (4.7%) | 9. Minnesota (2.1%) |
| 5. Colorado (4.2%) | 10. Missouri (2.1%) |

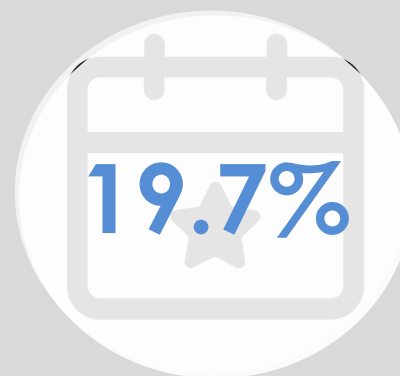
Top Activities Participated In



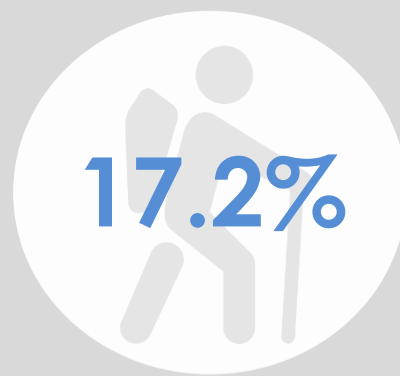
Dining in Restaurants



Shopping



Other festival or special event



Hiking/jogging/walking

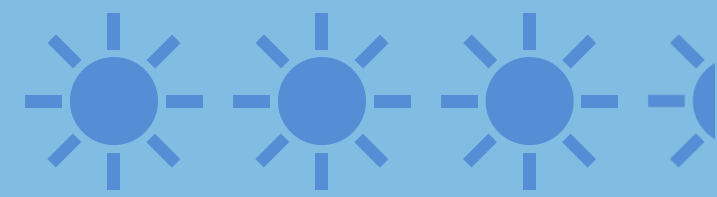


Sporting event



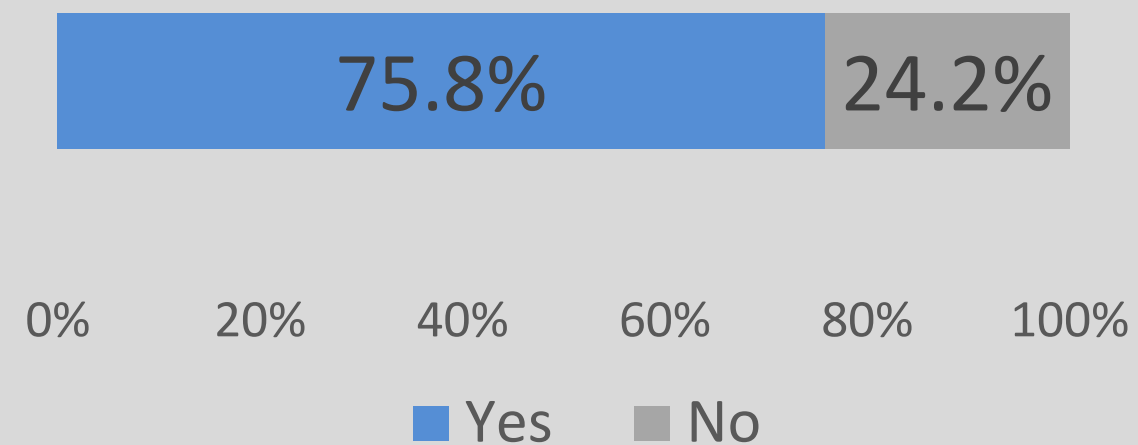
Visit local friends & family

Length of Stay



3.3 Days (On Average)

Billings Sole Destination of Trip



Daily Spending

\$171.67
Per Person

Top Motivations for Visiting

1. Businesses Billings offers (30.5%)
2. Special event/festival (18.6%)
3. Shopping opportunities (18.3%)
4. Friends or family in the area (17.4%)
5. Good hotel rate (15.9%)

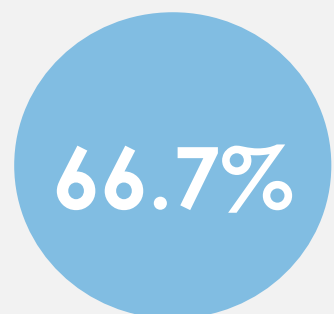
Key Demographics



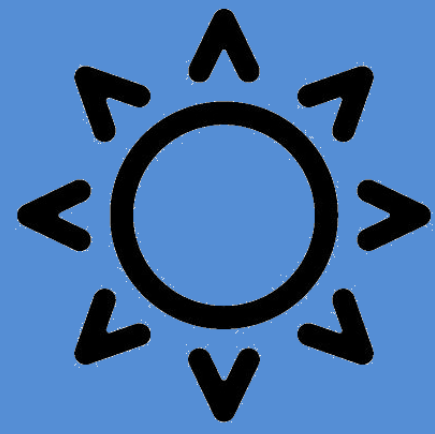
Average Age



Average Annual Household Income



Married



THE DAY TRIP VISITOR

Results presented here are reflective of visitors who did not stay overnight in Billings during their trip.

Method of Arrival



Personal Vehicle
(70.1%)



Airplane (BIL)
(24.8%)

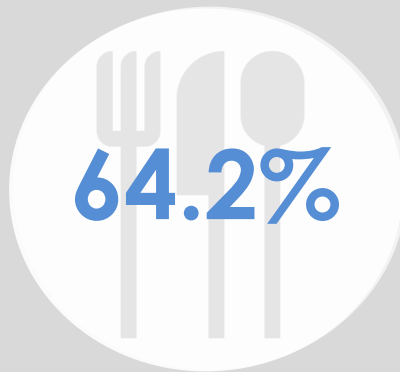


Rental Vehicle
(3.1%)

Point of Origin: Top States

- | | |
|----------------------|----------------------|
| 1. Montana (56.6%) | 6. Texas (2.0%) |
| 2. Wyoming (15.6%) | 7. Arizona (2.0%) |
| 3. Colorado (3.3%) | 8. Washington (1.6%) |
| 4. California (2.0%) | 9. Minnesota (1.6%) |
| 5. N. Dakota (2.0%) | 10. Oregon (1.2%) |

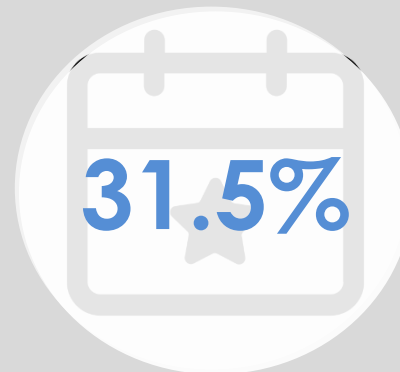
Top Activities Participated In



Dining in Restaurants



Shopping



Other festival or special event



Visit local friends & family

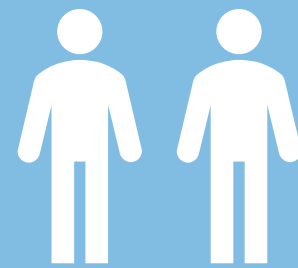


Sporting event



Hiking/jogging/walking

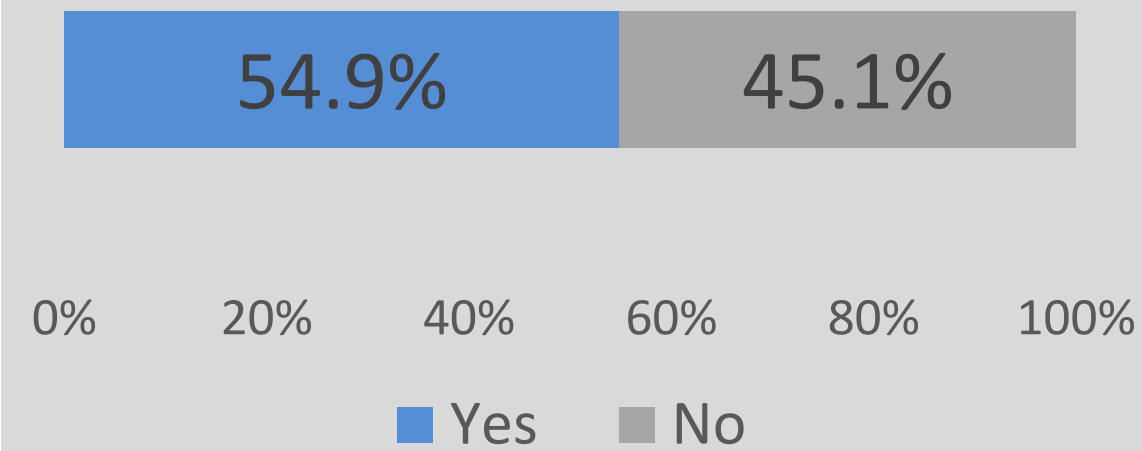
Travel Party



2.0 People

12.2% Traveled with Children

Billings Sole Destination of Trip



Daily Spending

\$104.07 Per Person

Top Motivations for Visiting

1. Special event/festival (32.3%)
2. Good deal on airfare (32.3%)
3. Shopping opportunities (31.1%)
4. Friends or family in the area (17.3%)
5. Businesses Billings offers (7.9%)

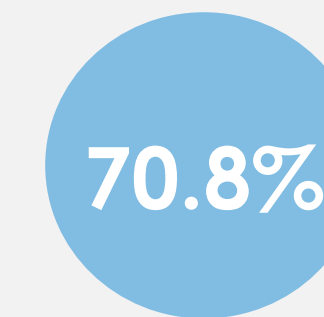
Key Demographics



Average Age



Average Annual Household Income



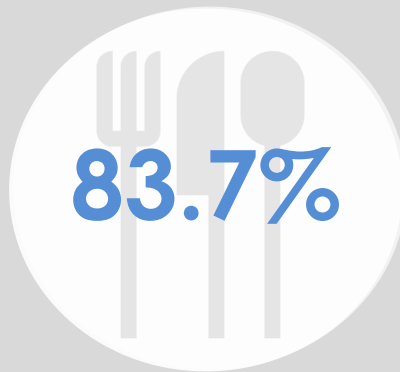
Married



THE BUSINESS/ CONVENTION TRAVELER

Results presented here are reflective of visitors who said their primary reason for visiting Billings was for business or a convention/group meeting.

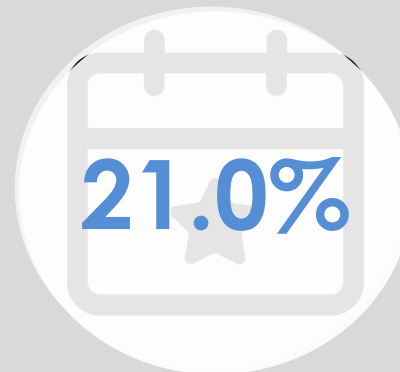
Top Activities Participated In



Dining in Restaurants



Shopping



Other festival or special event



Hiking/jogging/walking



Walkable Brewery District



Museums/art galleries/art walks, etc.

Method of Arrival



Airplane (BIL) (55.8%)



Personal Vehicle (38.6%)

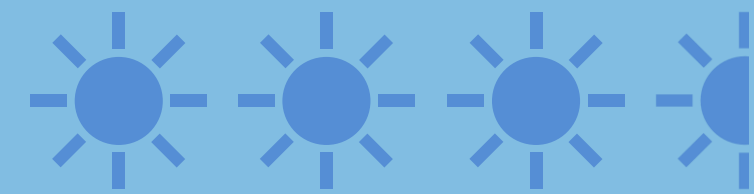


Rental Vehicle (3.4%)

Point of Origin: Top States

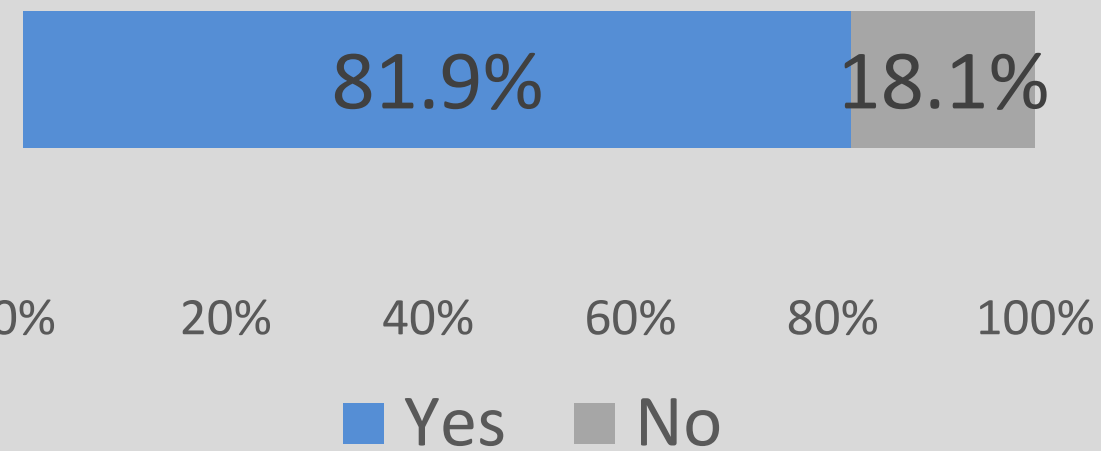
- | | |
|----------------------|---------------------|
| 1. Montana (28.1%) | 6. Texas (3.2%) |
| 2. Colorado (8.6%) | 7. Idaho (2.7%) |
| 3. Washington (6.3%) | 8. Michigan (2.7%) |
| 4. California (5.9%) | 9. Utah (2.3%) |
| 5. Wyoming (3.2%) | 10. Oklahoma (2.3%) |

Length of Stay



3.6 Days (On Average)

Billings Sole Destination of Trip



Daily Spending

\$184.89
Per Person

Top Motivations for Visiting

1. Businesses Billings offers (73.4%)
2. Agricultural needs (15.0%)
3. Special event/festival (12.4%)
4. Shopping opportunities (8.2%)
5. Good hotel rate (7.3%)

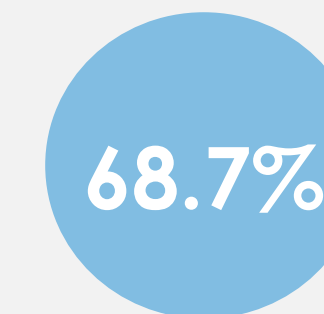
Key Demographics



Average Age



Average Annual Household Income



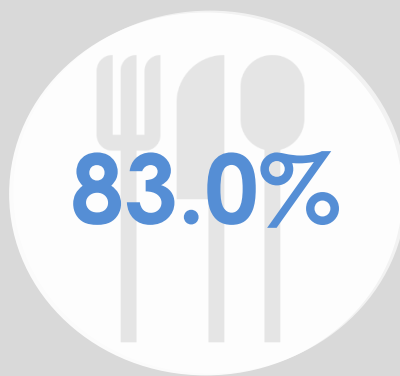
Married



THE SPECIAL EVENT/FESTIVAL GOER

Results presented here are reflective of visitors who said a special event/festival motivated them to visit Billings.

Top Activities Participated In



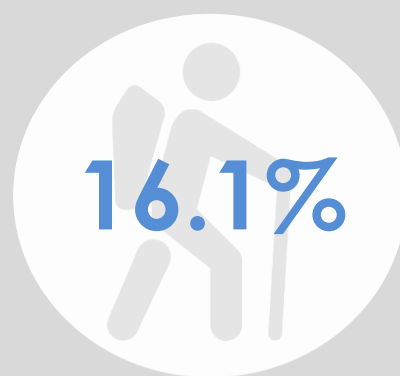
Dining in Restaurants



Other festival or special event



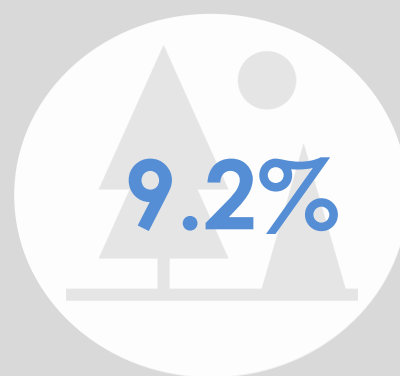
Shopping



Hiking/jogging/walking



Visit local friends & family



Visit a state or local park

Method of Arrival



Personal Vehicle (87.2%)



Airplane (BIL) (11.9%)

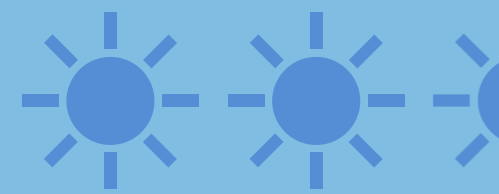


Rental Vehicle (0.5%)

Point of Origin: Top States

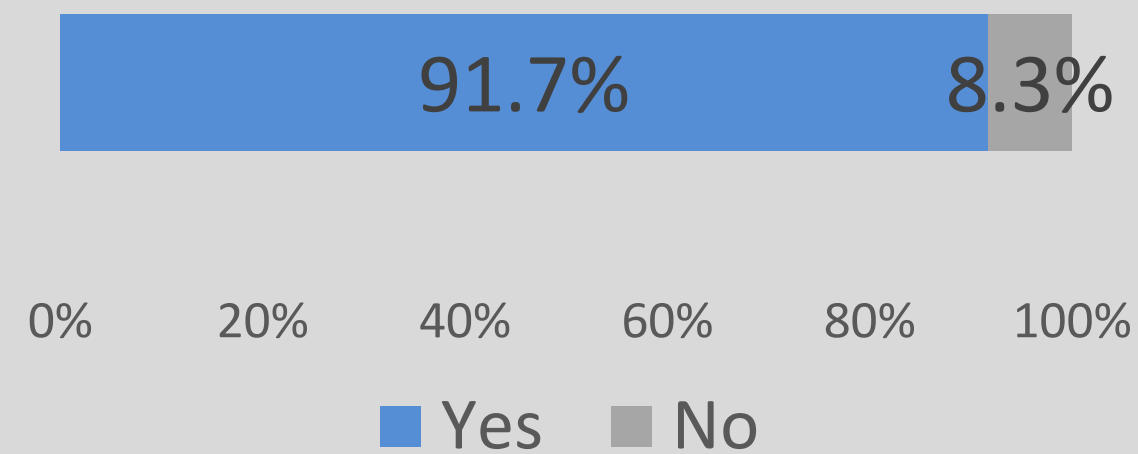
- | | |
|----------------------|-----------------------|
| 1. Montana (64.1%) | 6. Missouri (1.9%) |
| 2. Wyoming (11.5%) | 7. Colorado (1.4%) |
| 3. California (2.9%) | 8. Texas (1.4%) |
| 4. Idaho (1.9%) | 9. S. Dakota (1.4%) |
| 5. N. Dakota (1.9%) | 10. Washington (1.0%) |

Length of Stay



2.3 Days (On Average)

Billings Sole Destination of Trip



Daily Spending

\$139.94 Per Person

Top Motivations for Visiting

1. Shopping opportunities (33.0%)
2. Friends or family in the area (21.1%)
3. Agricultural needs (12.4%)
4. Good hotel rate (8.7%)
5. Local businesses (7.3%)

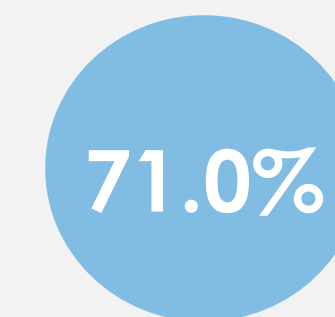
Key Demographics



Average Age



Average Annual Household Income



Married



DETAILED FINDINGS

SOURCE: 2017/18 BILLINGS VISITOR PROFILE STUDY

ABOUT THIS SECTION

In the remainder of this report, data from the Visitor Intercept Survey findings is presented as follows:

- The aggregate total is shown in the chart on the left
- On the right, a data table shows the findings broken out by type of visitor:
 1. Hotel—Visitors who stayed overnight at a Billings area hotel during their trip
 2. Home Sharing—Visitors who stayed overnight at a Billings area home sharing rental during their trip
 3. VFR—Visitors who stayed overnight in a private residence of a friend or family member in the Billings area
 4. Day Trip—Visitors who did not stay overnight anywhere in the Billings area

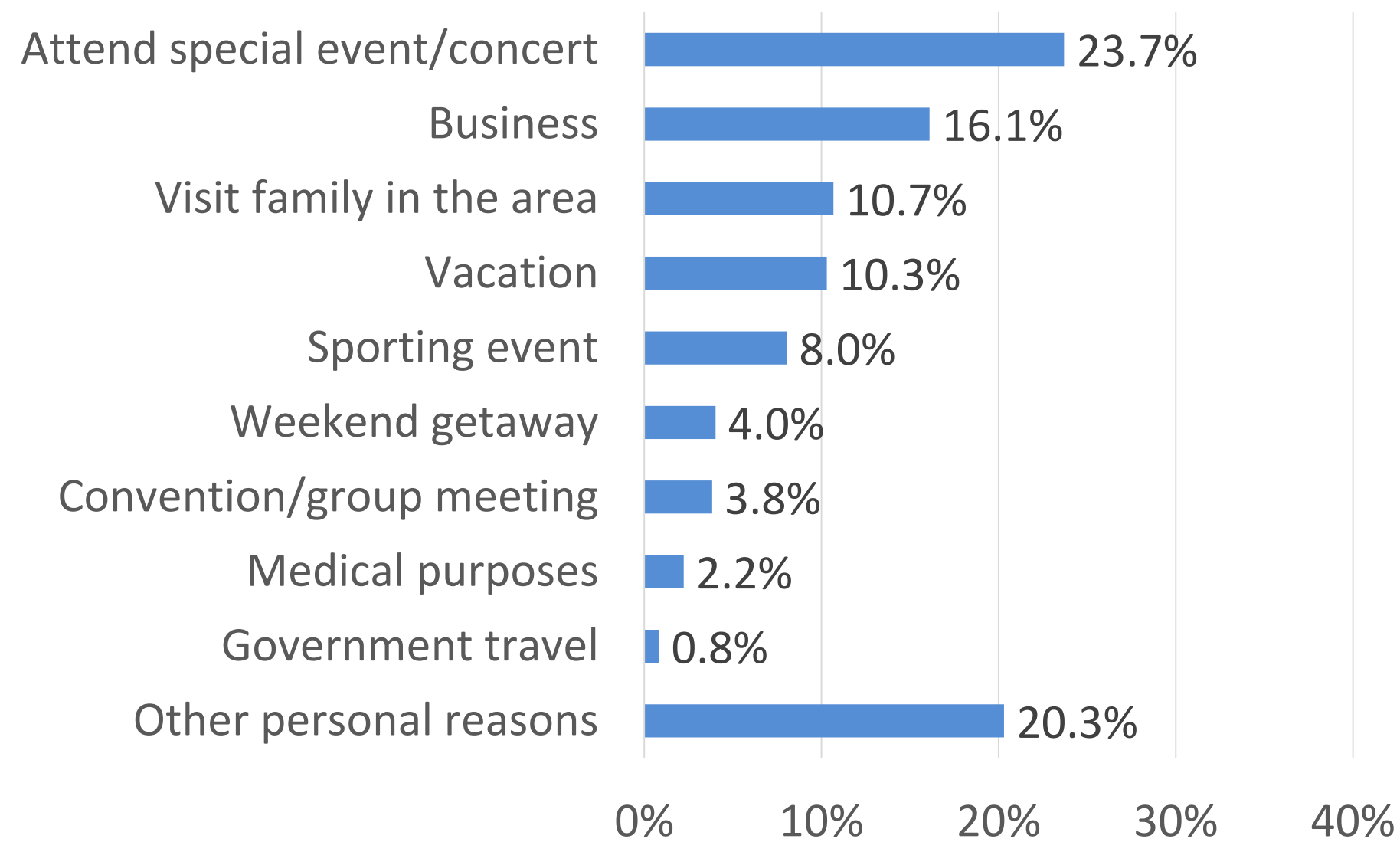
Key Definitions:

- 1. Travel Group** - Includes the number of people traveling together in the same group
- 2. Travel Party** – Number of people covered by reported in-market spending

Primary Reason for Visit

Nearly half of all visitors surveyed in this research study traveled to the Billings area primarily for leisure purposes (46.0%). This includes the 23.7 percent of Billings visitors who said they came to Billings for a special event or concert, 10.3 percent who said they were on a vacation, 8.0 percent who came for a sporting event, and 4.0 percent who characterized their trip as a weekend getaway. One-in-five visitors surveyed (20.7%) were in the Billings area for business, a convention/group meeting or government travel. One-in-ten (10.7%) were visiting family in the area.

Figure 12: Primary Reason for Visit



Base: All respondents. 924 responses.

Detail by Type of Visitor

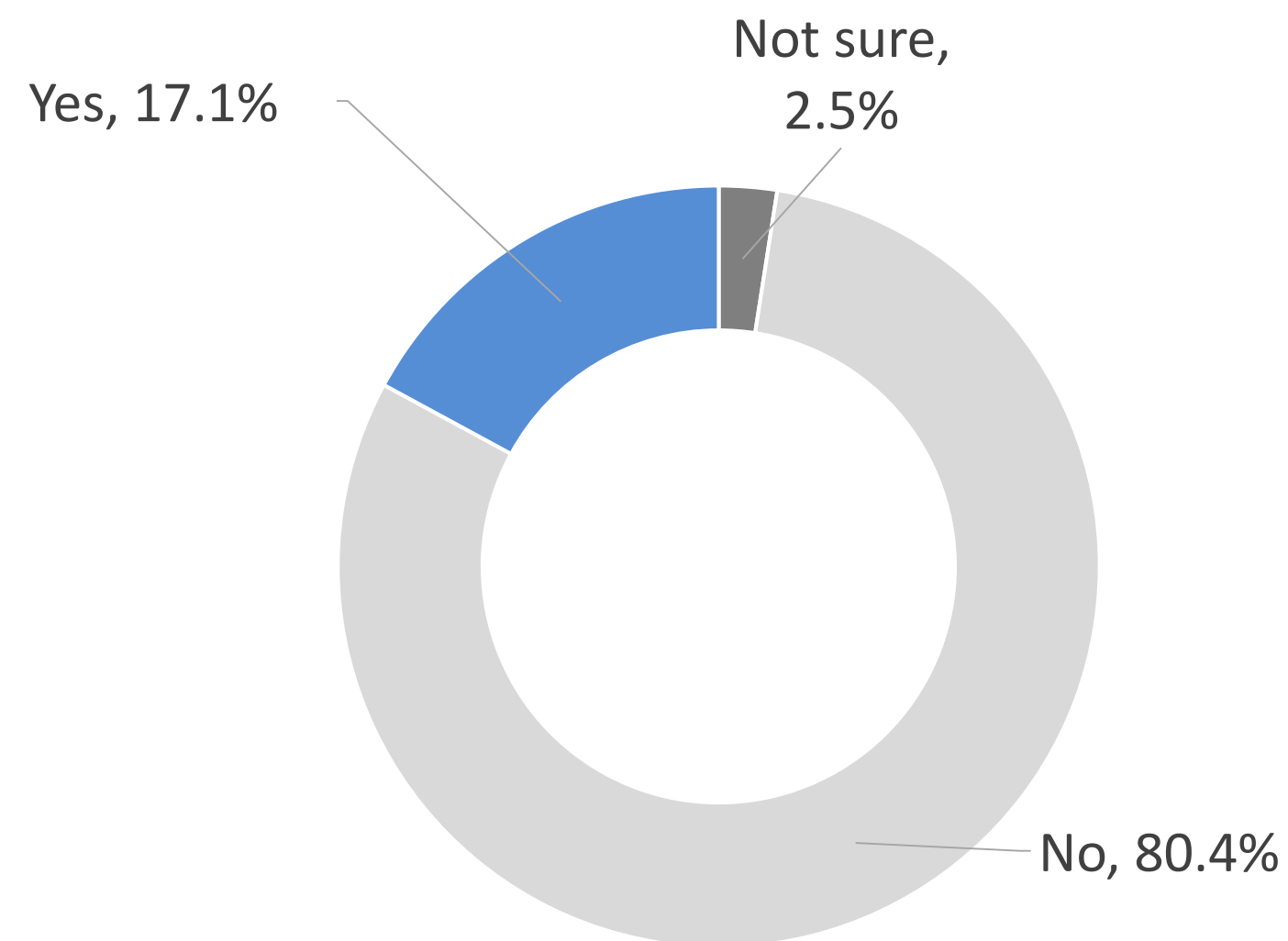
	Hotel	Home Share	VFR	Day Trip
Attend special event/concert	13.7%	55.6%	14.8%	28.5%
Business	28.2%	0.0%	9.1%	11.5%
Visit family in the area	10.5%	22.2%	42.0%	8.3%
Vacation	12.7%	0.0%	8.0%	9.1%
Sporting event	13.2%	11.1%	10.2%	5.5%
Weekend getaway	4.7%	0.0%	2.3%	4.0%
Convention/group meeting	5.2%	0.0%	0.0%	3.6%
Medical purposes	3.1%	0.0%	6.8%	1.6%
Government travel	1.6%	0.0%	2.3%	0.4%
Other personal reasons	7.1%	11.1%	4.5%	27.7%
Sample Size:	553	9	88	253

Question: Which best describes your primary reason for visiting Billings? (Select one)

Business Travelers: Extended Business Trip for Leisure

Nearly two-in-ten business travelers extended their trip to Billings for leisure purposes (17.1%). Of the business travelers who reported extending their stay in Billings for leisure, these travelers reported staying an additional 4.5 days on average.

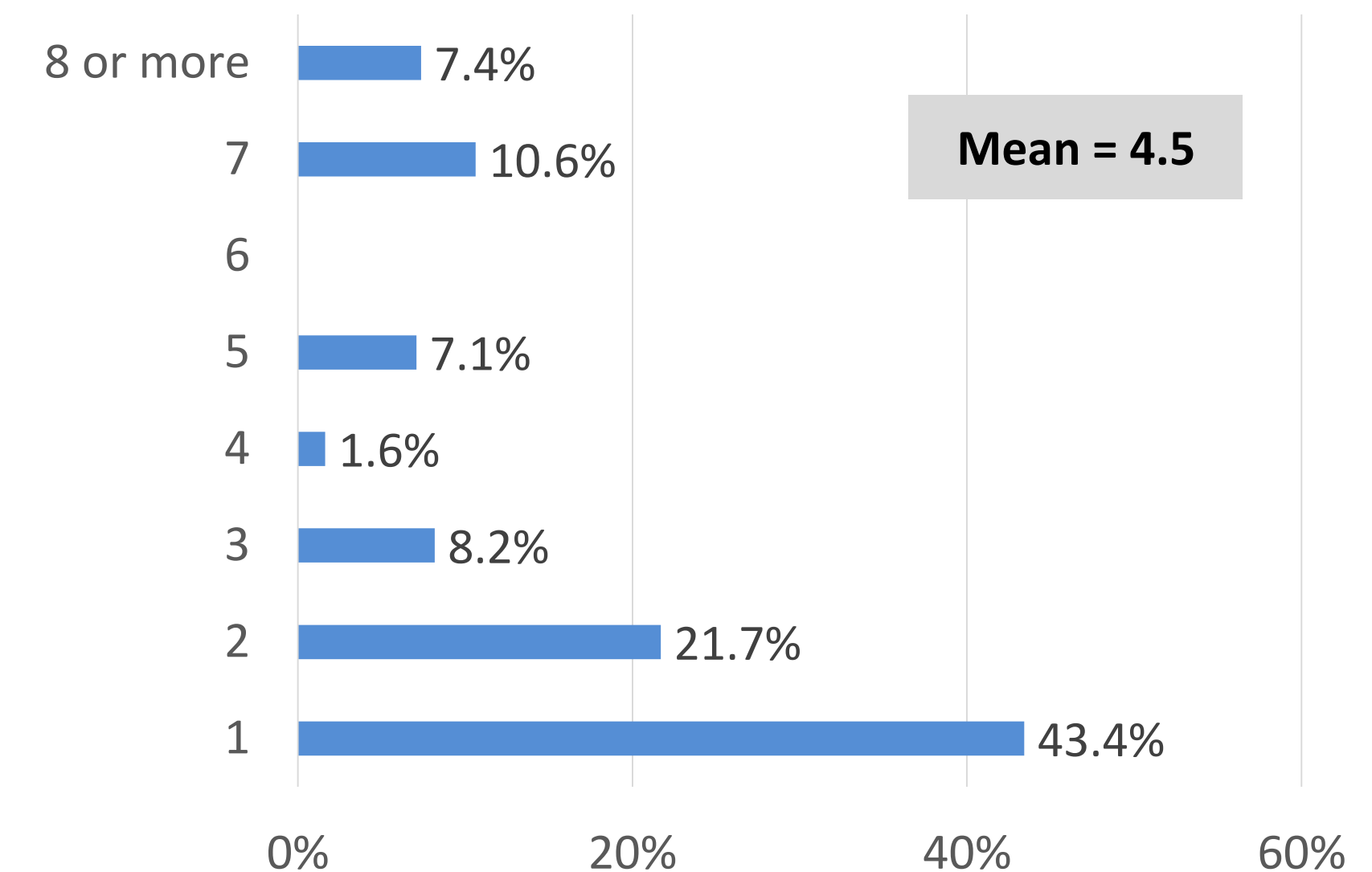
Figure 13A: Extended Business Trip for Leisure



Question: Did you—or will you—extend your stay in Billings for leisure or personal reasons?
Base: Respondents who were in Billings on a business trip. 242 responses.

Figure 13B: Days Extended Business Trip for Leisure*

*Note small sample size. This data is for informational purposes only.



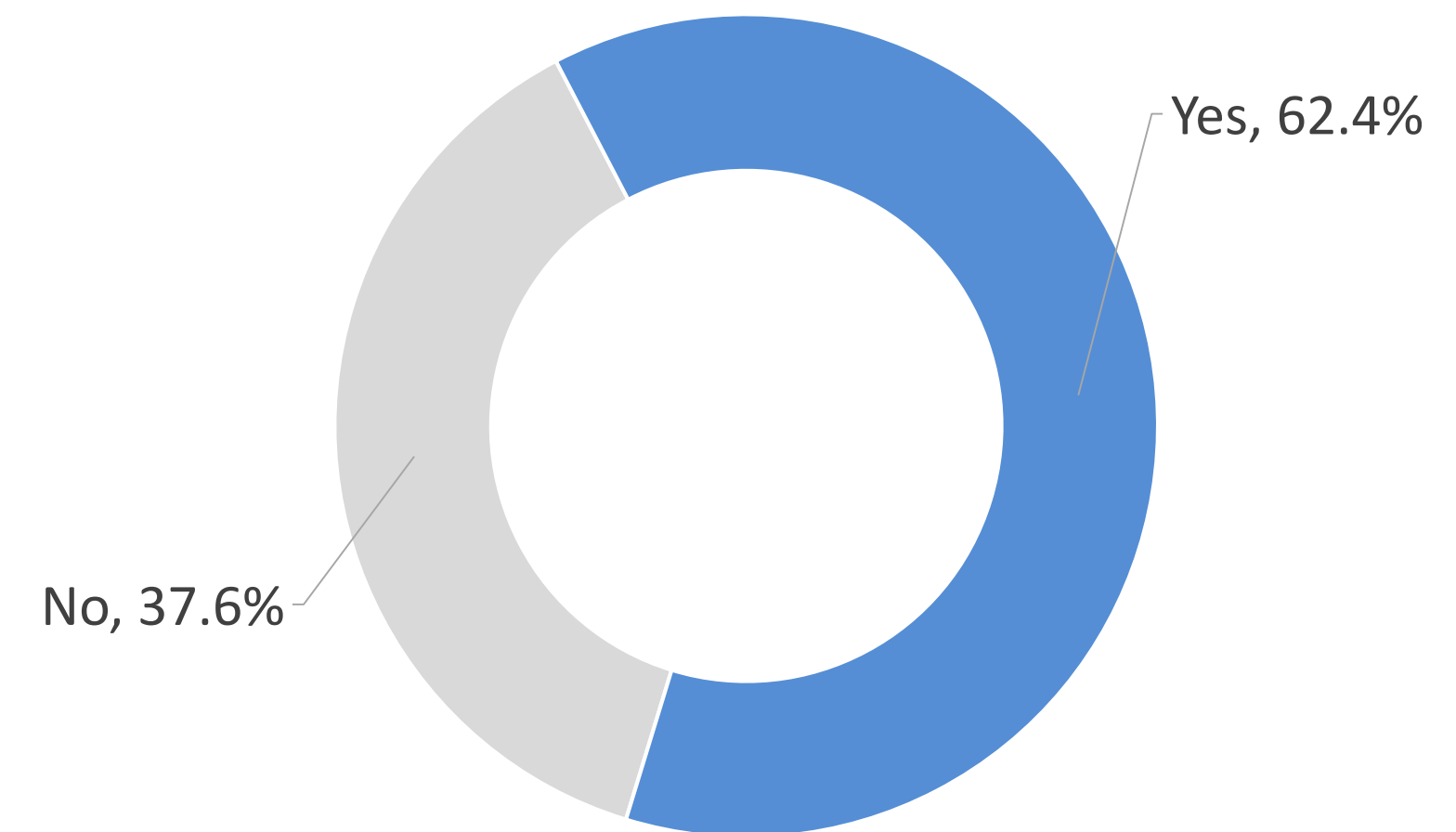
Question: How many days did you—or will you—extend your stay in Billings for leisure or personal reasons?
Base: Respondents who extended their business trip for leisure purposes. 40 responses.

Overnight Stay

A majority of visitors surveyed were staying overnight outside of their home on their trip (62.4%).

Question: Are you staying overnight outside of your home on this trip?
Base: All respondents. 926 responses.

Figure 14: Overnight Stay

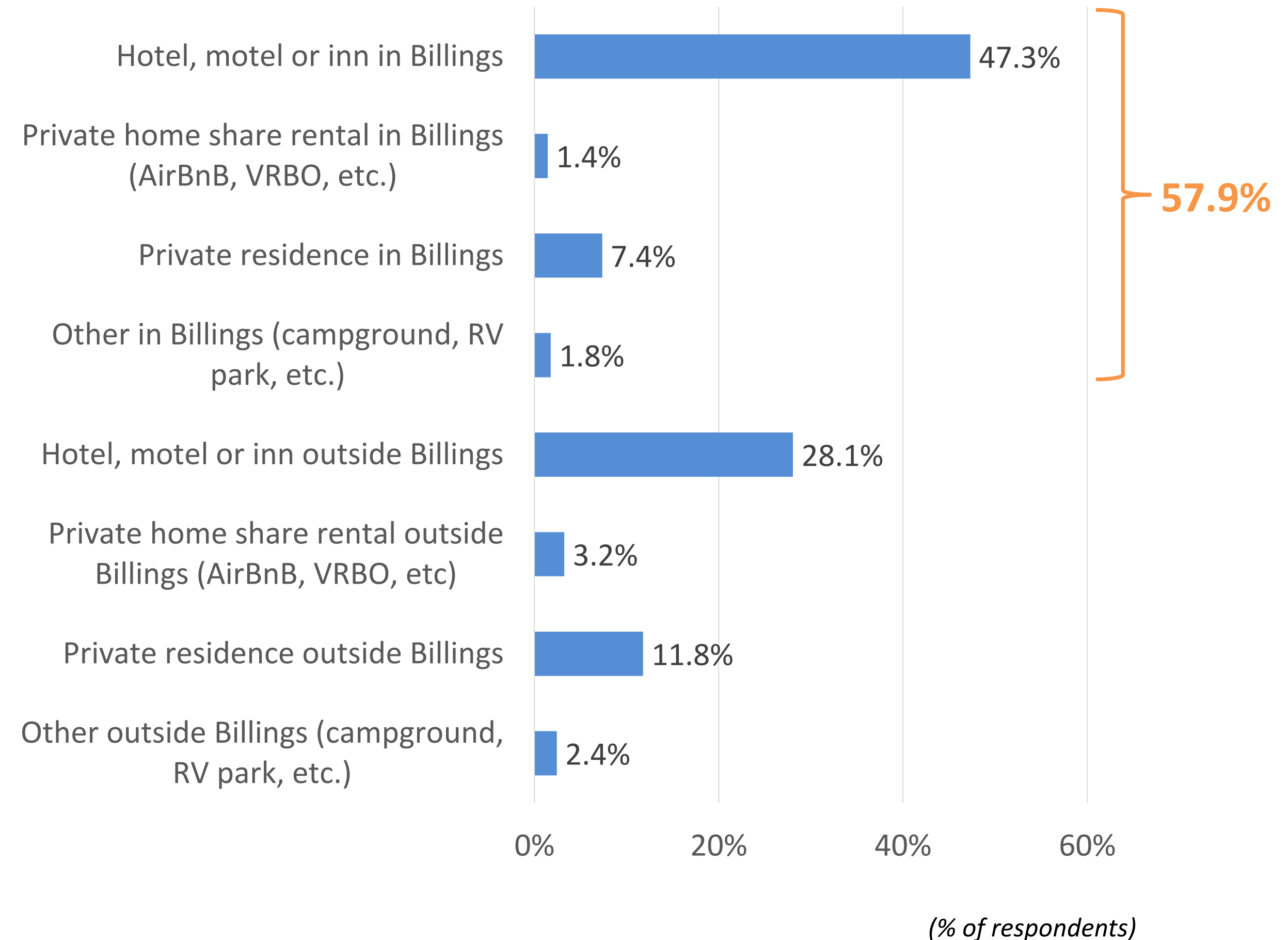


(% of respondents)

Overnight Visitors: Place of Stay

Approximately one-half of all overnight visitors surveyed stayed in a Billings area hotel during their trip (47.3%). Less than one-in-ten overnight visitors stayed in the private residence of a local friend or family member (7.4%). Home sharing rentals such as those booked through Airbnb and VRBO captured 1.4 percent of overnight area visitors, while another 1.8 percent of visitors stayed in other accommodations in Billings such as a campground or RV park.

Figure 15: Place of Stay

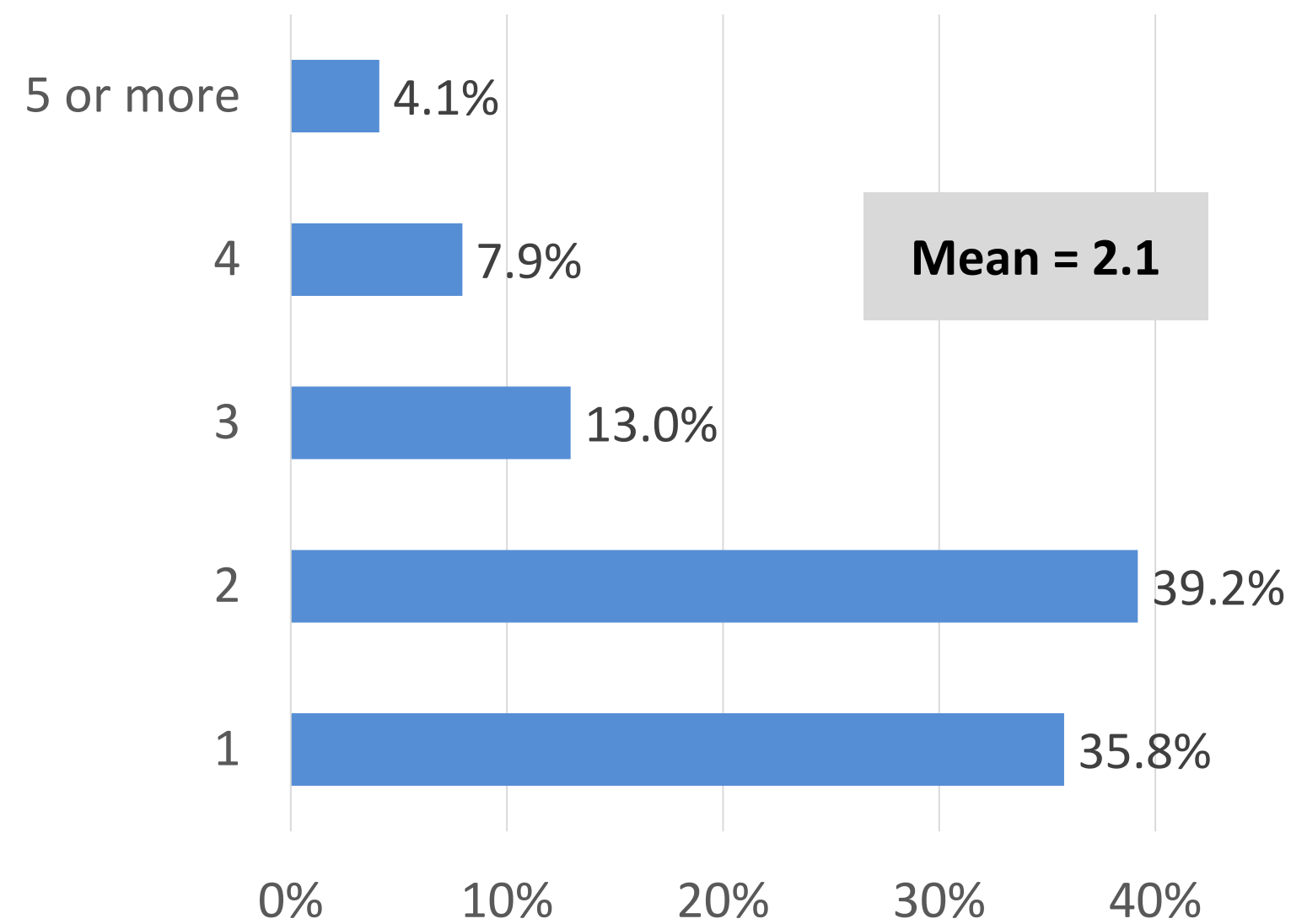


Question: Where are you staying on this trip? (Select all that apply)
Base: Respondents who stayed overnight outside their home on their trip. 776 responses.

Paid Lodging Guests: Number of People in Hotel Room/Rental

Visitors who stayed overnight in paid accommodations in the area reported having an average of 2.1 people in their hotel room/rental, including themselves. Approximately four-in-ten of these visitors shared their hotel room/rental with just one other person (39.2%) while another 35.8 percent were the sole occupant of the hotel room/rental. One-quarter of these visitors stayed in a hotel room/rental with 3 or more occupants (25.0%). The typical Home Share visitor had more people in their rental compared to the average Hotel Guest (3.0 people vs. 2.1 people, respectively).

Figure 16: Number of People in Hotel Room/Rental



Detail by Type of Visitor

	Hotel	Home Share
5 or more	3.9%	12.5%
4	7.9%	12.5%
3	12.5%	37.5%
2	39.4%	25.0%
1	36.3%	12.5%
Mean # of People:	2.1	3.0
Sample Size:	543	8

Base: Respondents who stayed overnight in paid accommodations in Billings. 551 responses.

Question: If staying in a hotel or private home share rental in Billings: How many people, including yourself, are staying in your hotel room or rental?

Days & Nights in Billings

On average, visitors to the Billings area spent 2.0 days and 1.2 nights in the destination.

As expected, VFRs stayed the longest in Billings, with an average trip length of 5.0 days and 4.5 nights. Hotel guests stayed an average of 3.3 days and 2.8 nights in the area.

Figure 17: Days & Nights in Billings

	Days	Nights
8 or more	1.9%	1.6%
7	1.3%	1.1%
6	1.2%	1.2%
5	4.3%	5.7%
4	3.2%	1.4%
3	8.6%	3.4%
2	9.0%	10.1%
1	70.5%	13.3%
0	-	62.2%
Mean:	2.0	1.2
Sample Size:	844	844

Question: How many total days and nights did you (or will you) stay in the Billings area?
Base: All respondents. 883 responses.

Detail by Type of Visitor

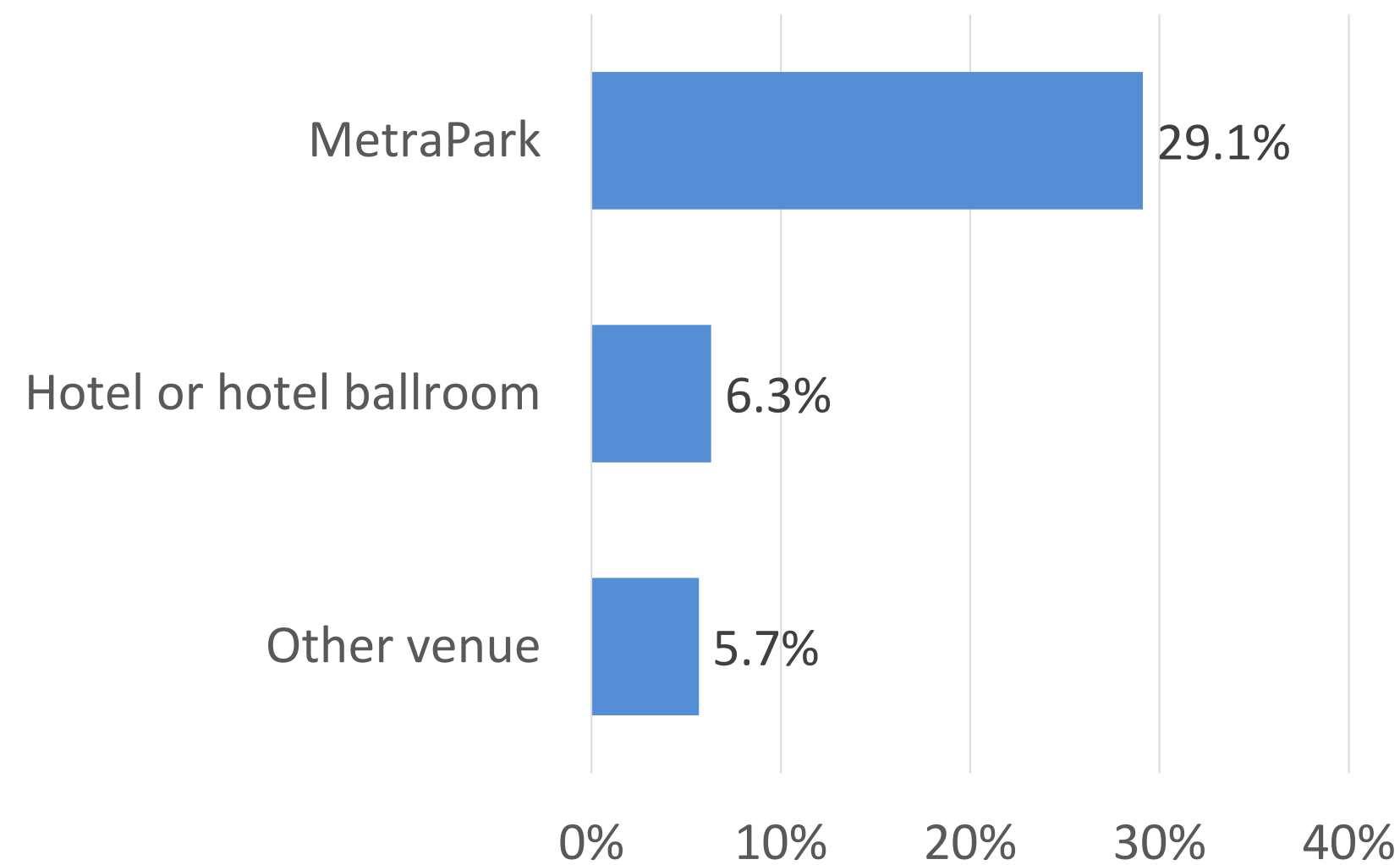
		Hotel	Home Share	VFR	Day Trip
Days	8 or more	3.3%	-	15.1%	-
	7	2.9%	-	7.0%	-
	6	2.8%	-	4.7%	-
	5	8.3%	-	10.5%	-
	4	11.4%	11.1%	9.3%	-
	3	22.8%	44.4%	18.6%	-
	2	24.1%	33.3%	23.3%	-
	1	24.4%	11.1%	11.6%	100.0%
	Mean:	3.3	2.6	5.0	1.0
	Nights	8 or more	2.8%	-	11.6%
7		1.8%	-	10.5%	-
6		3.1%	-	3.5%	-
5		3.7%	-	3.5%	-
4		8.6%	11.1%	9.3%	-
2		27.0%	66.7%	18.6%	-
1		37.1%	11.1%	25.6%	-
0		-	-	-	100.0%
Mean:		2.8	1.9	4.5	-
Sample Size:		544	9	86	223

Location of Meetings or Events

When asked about attending meetings or events in Billings, three-in-ten visitors said they were visiting or planning to attend a meeting or event at MetraPark (29.1%).

Approximately six percent said they would attend an event at a hotel or hotel ballroom (6.3%) or at a different venue (5.7%).

Figure 18: Location of Meetings or Events



Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
MetraPark	19.9%	11.1%	29.5%	33.9%
Hotel or hotel ballroom	11.5%	0.0%	3.4%	4.3%
Other venue	14.7%	0.0%	5.7%	1.6%
Sample Size:	558	9	88	254

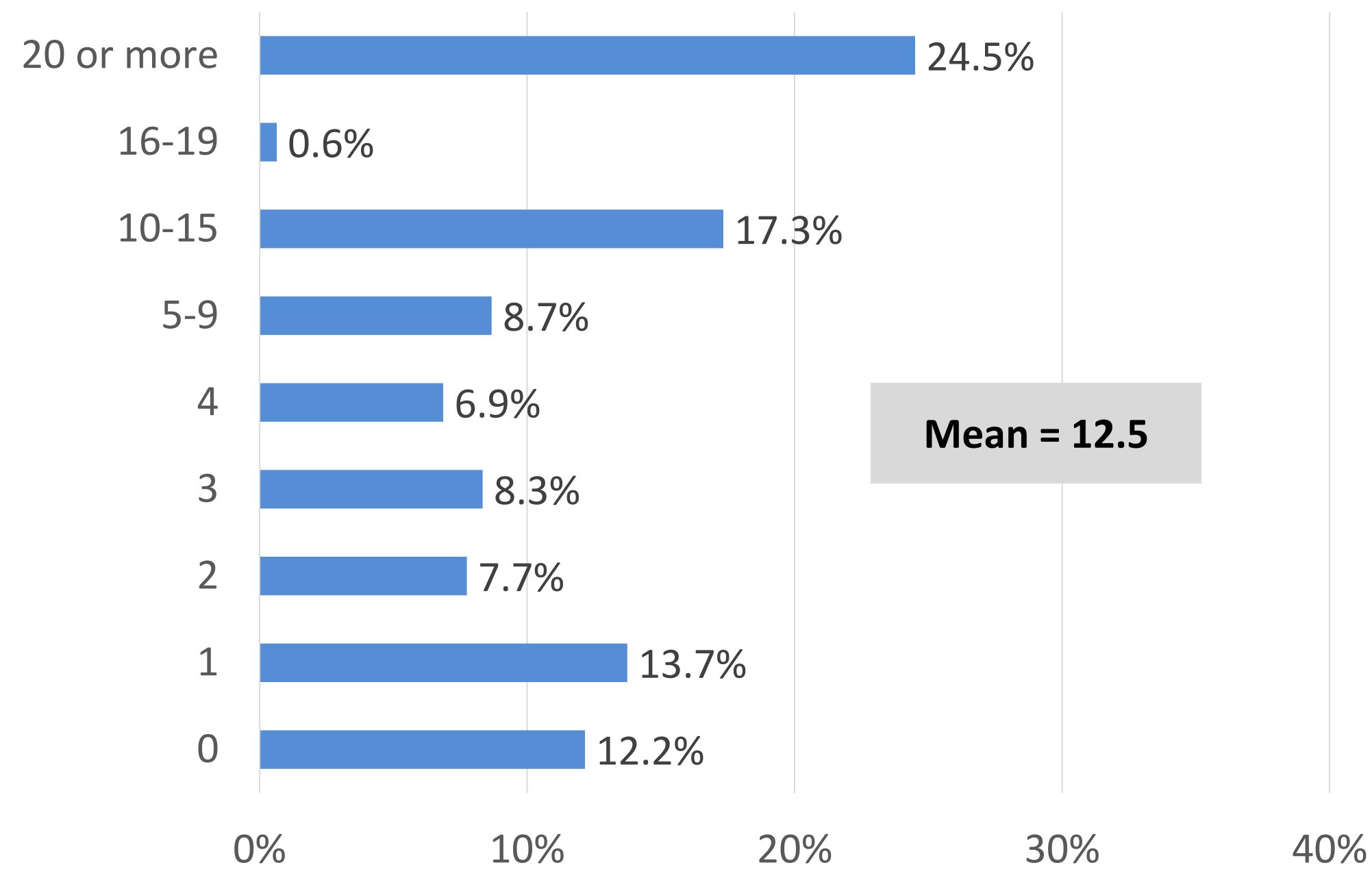
Base: All respondents. 930 responses.

Question: Did you—or will you—attend any meetings or events at any of the following?
(Select all that apply)

Past Visitation to Billings

One-in-ten visitors surveyed were first-time visitors to Billings (12.2%). The average Billings visitor surveyed has previously made 12.5 trips to the city.

Figure 19: Past Visitation to Billings



Base: All respondents. 450 responses.

Detail by Type of Visitor

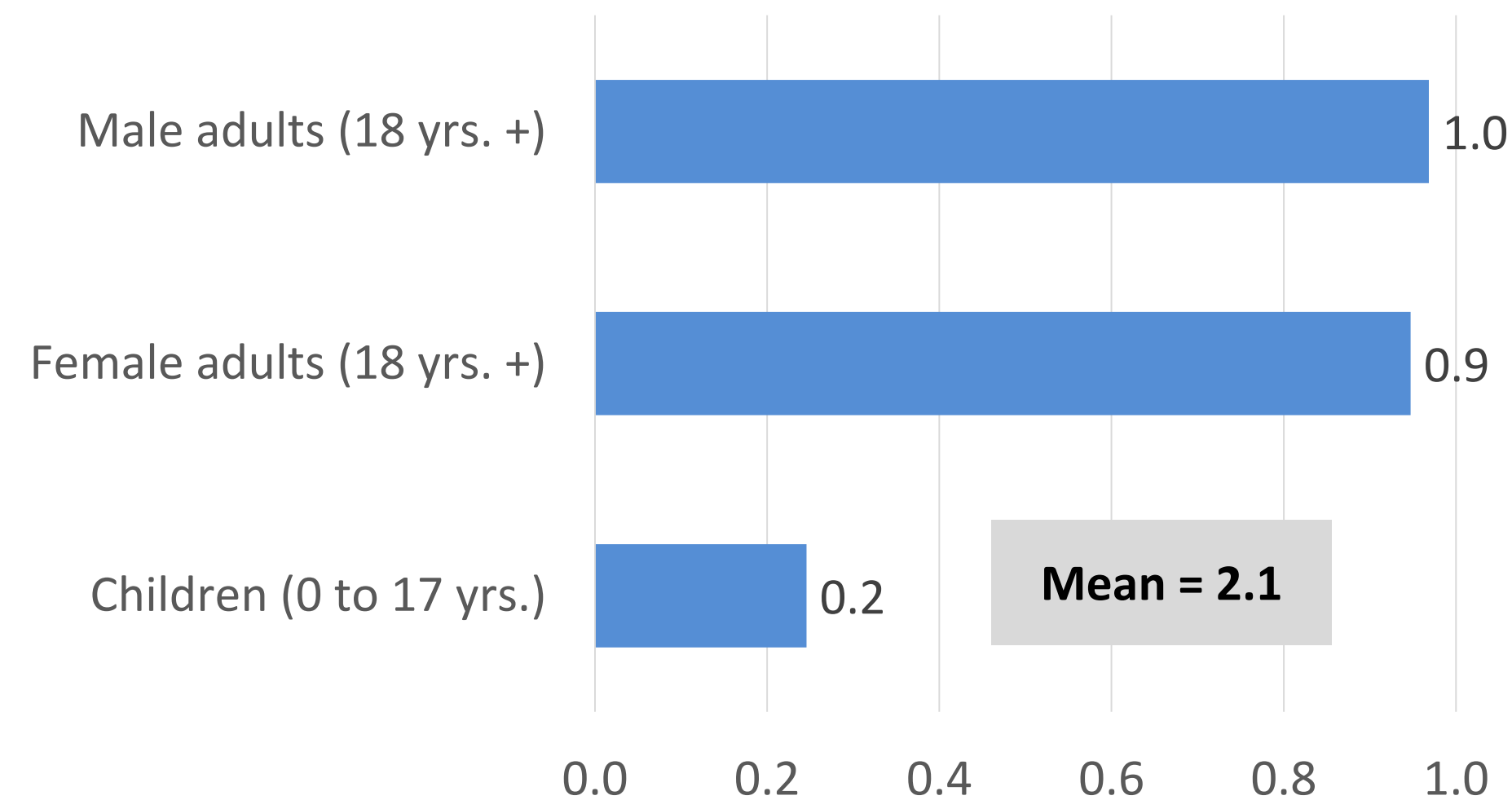
	Hotel	Home Share	VFR	Day Trip
20 or more	21.7%	25.0%	22.5%	27.8%
16-19	0.0%	0.0%	0.0%	1.3%
10-15	12.7%	0.0%	22.5%	21.5%
5-9	9.9%	25.0%	12.5%	7.6%
4	3.5%	0.0%	12.5%	8.9%
3	10.2%	0.0%	5.0%	7.6%
2	8.6%	0.0%	10.0%	7.6%
1	21.3%	0.0%	2.5%	10.1%
0	12.1%	50.0%	12.5%	7.6%
Mean:	11.1	7.0	13.7	13.9
Sample Size:	314	4	40	79

Question: Prior to this visit, how many times have you been to Billings?

Travel Group Composition

The typical travel group to Billings was comprised of 2.1 people. The average travel group included 1.0 adult males, 0.9 adult females and 0.2 children. In total, 13.1 percent of travel groups surveyed included children under age 18.

Figure 20: Travel Group Composition



Base: All respondents. 908 responses.

Detail by Type of Visitor

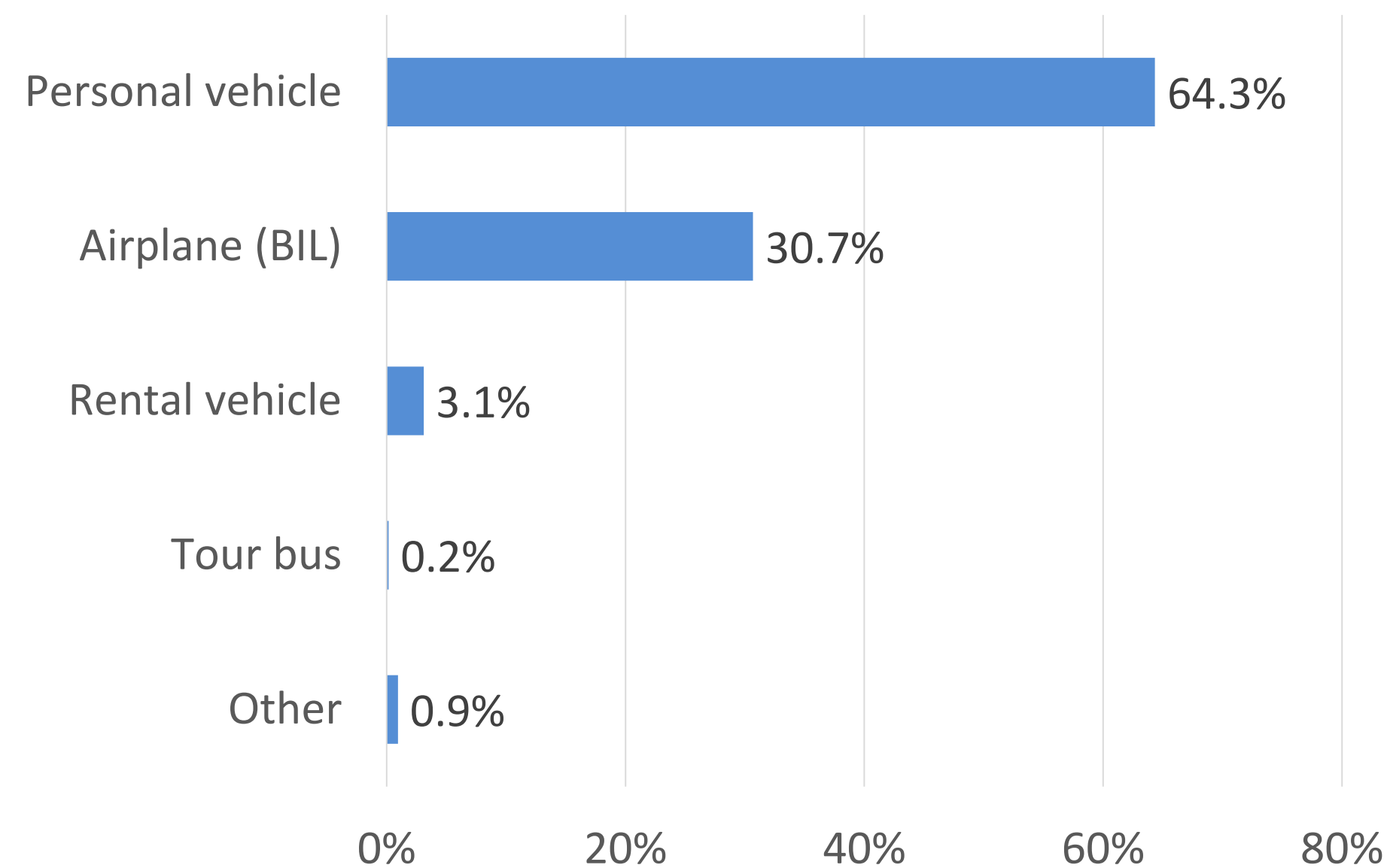
	Hotel	Home Share	VFR	Day Trip
Male adults (18 yrs. +)	1.0	1.2	0.7	1.0
Female adults (18 yrs. +)	1.1	1.3	0.9	0.8
Children (0 to 17 yrs.)	0.3	0.3	0.2	0.2
Mean # of People in Travel Group:	2.4	2.9	1.8	2.0
% of Travel Groups with Children:	16.9%	22.2%	9.1%	12.2%
Sample Size:	314	4	40	79

Question: How many people of each type are in your immediate traveling party, including yourself?

Method of Arrival

Two-thirds of visitors surveyed arrived in the Billings area by automobile (67.4%), using either a personal vehicle (64.3%) or a rental vehicle (3.1%). Three-in-ten visitors arrived to the area by plane through the Billings Airport (30.7%). Hotel guests are most likely to arrive to the Billings Airport (42.5%) compared to the other visitor types.

Figure 21: Method of Arrival



Base: All respondents. 930 responses.

Detail by Type of Visitor

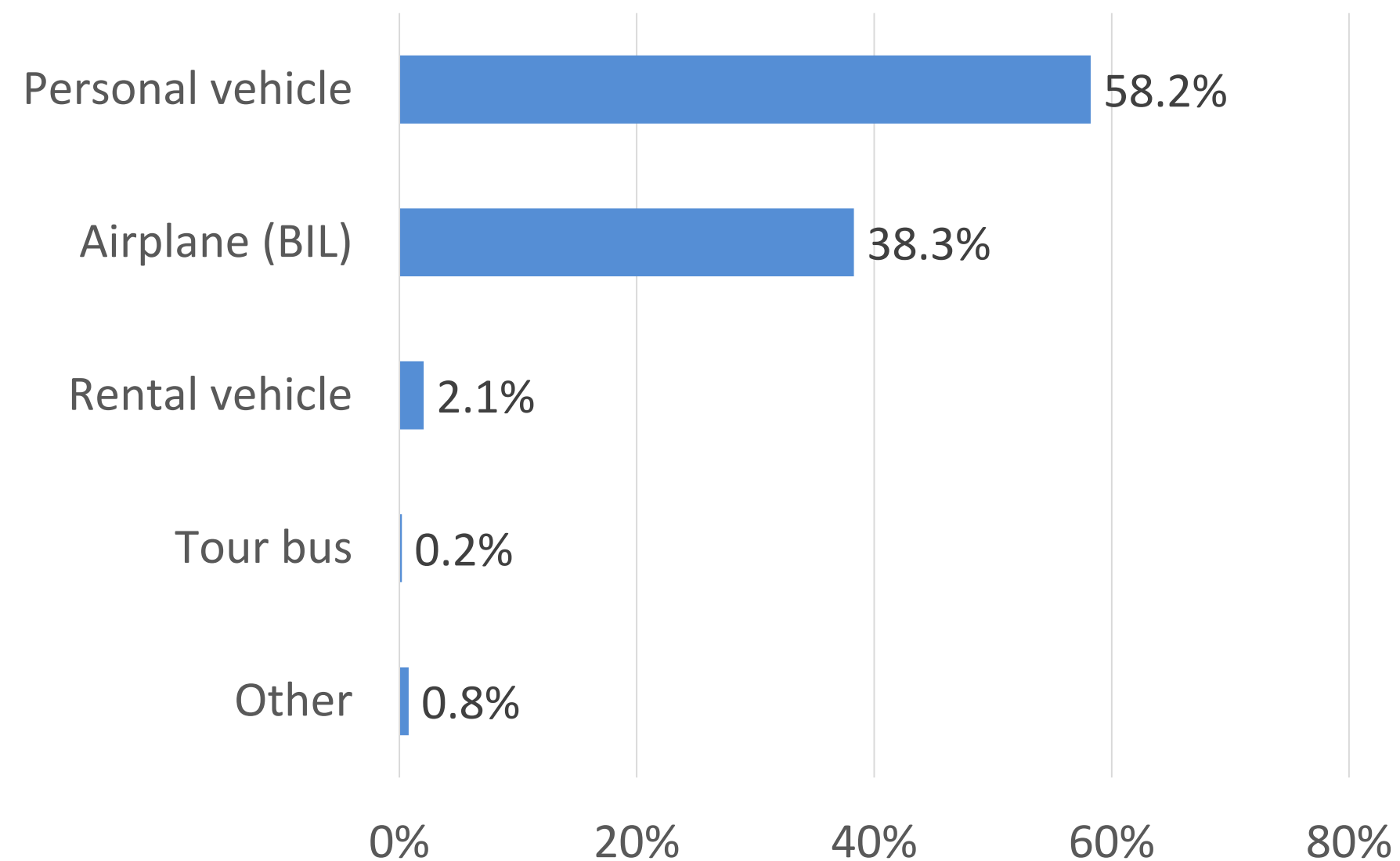
	Hotel	Home Share	VFR	Day Trip
Personal vehicle	51.3%	55.6%	61.4%	70.1%
Airplane (BIL)	42.5%	33.3%	36.4%	24.8%
Rental vehicle	4.3%	11.1%	0.0%	3.1%
Tour bus	0.5%	0.0%	0.0%	0.0%
Other	0.7%	0.0%	0.0%	1.2%
Sample Size:	558	9	88	254

Question: Please tell me what transportation you used to arrive in Billings and what transportation you will use to leave?

Method of Departure

Three-in-five visitors surveyed departed the Billings area by automobile (60.3%), through either personal vehicle (58.2%) or a rental vehicle (2.1%). 38.3 percent of visitors left the area by plane through the Billings airport.

Figure 22: Method of Departure



Base: All respondents. 930 responses.

Detail by Type of Visitor

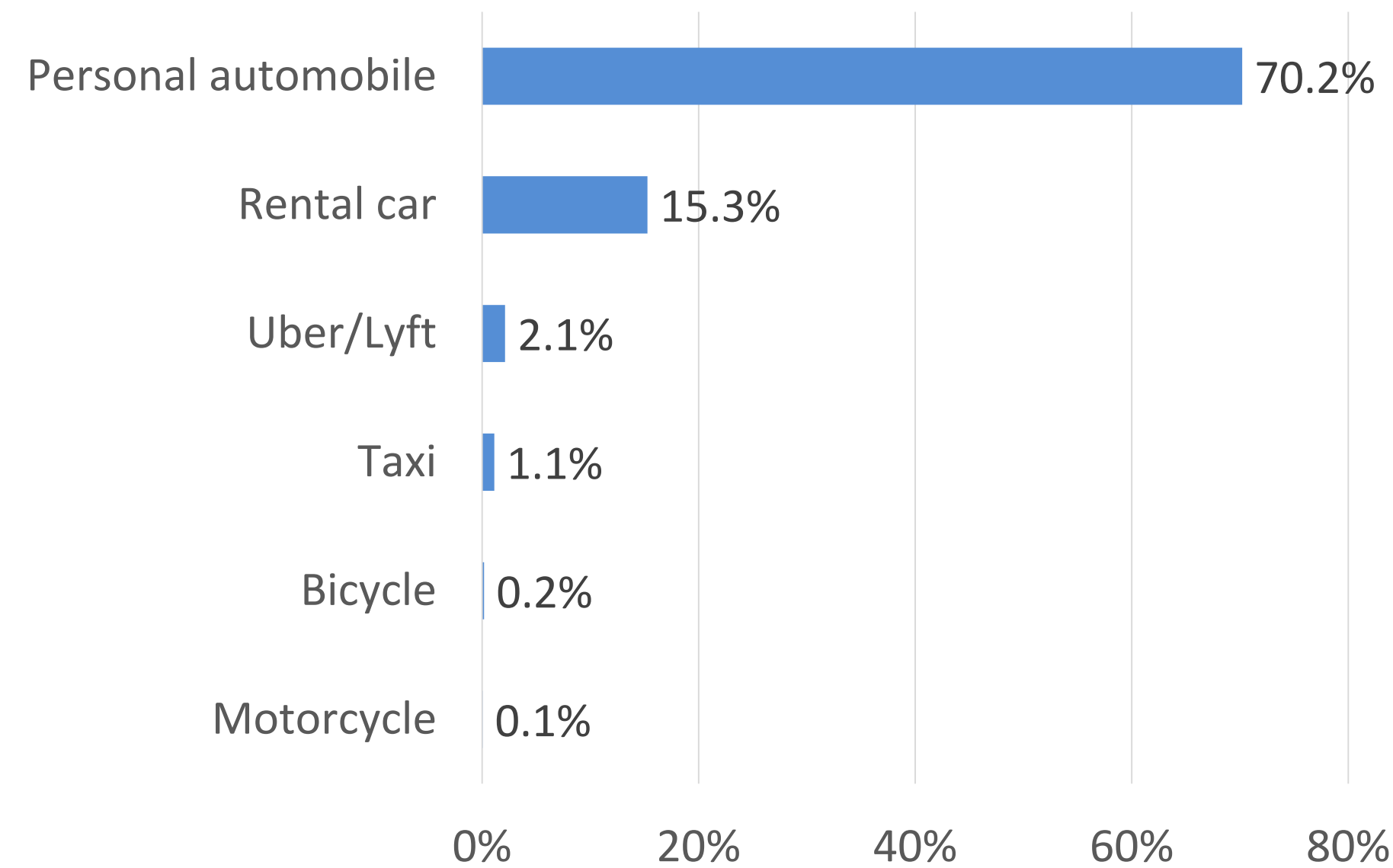
	Hotel	Home Share	VFR	Day Trip
Personal vehicle	50.4%	55.6%	61.4%	61.0%
Airplane (BIL)	43.2%	33.3%	37.5%	36.6%
Rental vehicle	4.7%	0.0%	0.0%	1.2%
Tour bus	0.7%	0.0%	0.0%	0.0%
Other	0.9%	0.0%	1.1%	0.8%
Sample Size:	558	9	88	254

Question: Please tell me what transportation you used to arrive in Billings and what transportation you will use to leave?

Transportation Used In-Market

As so many visitors arrived in the area via a personal automobile, this was the most utilized form of transportation in Billings by visitors. In total, 70.2 percent of visitors used a personal automobile to travel around Billings while another 15.3 percent used a rental car. Ride sharing services such as Uber or Lyft were used by another 2.1 percent and 1.1% reported using a taxi.

Figure 23: Transportation Used In-Market



Base: All respondents. 930 responses.

Detail by Type of Visitor

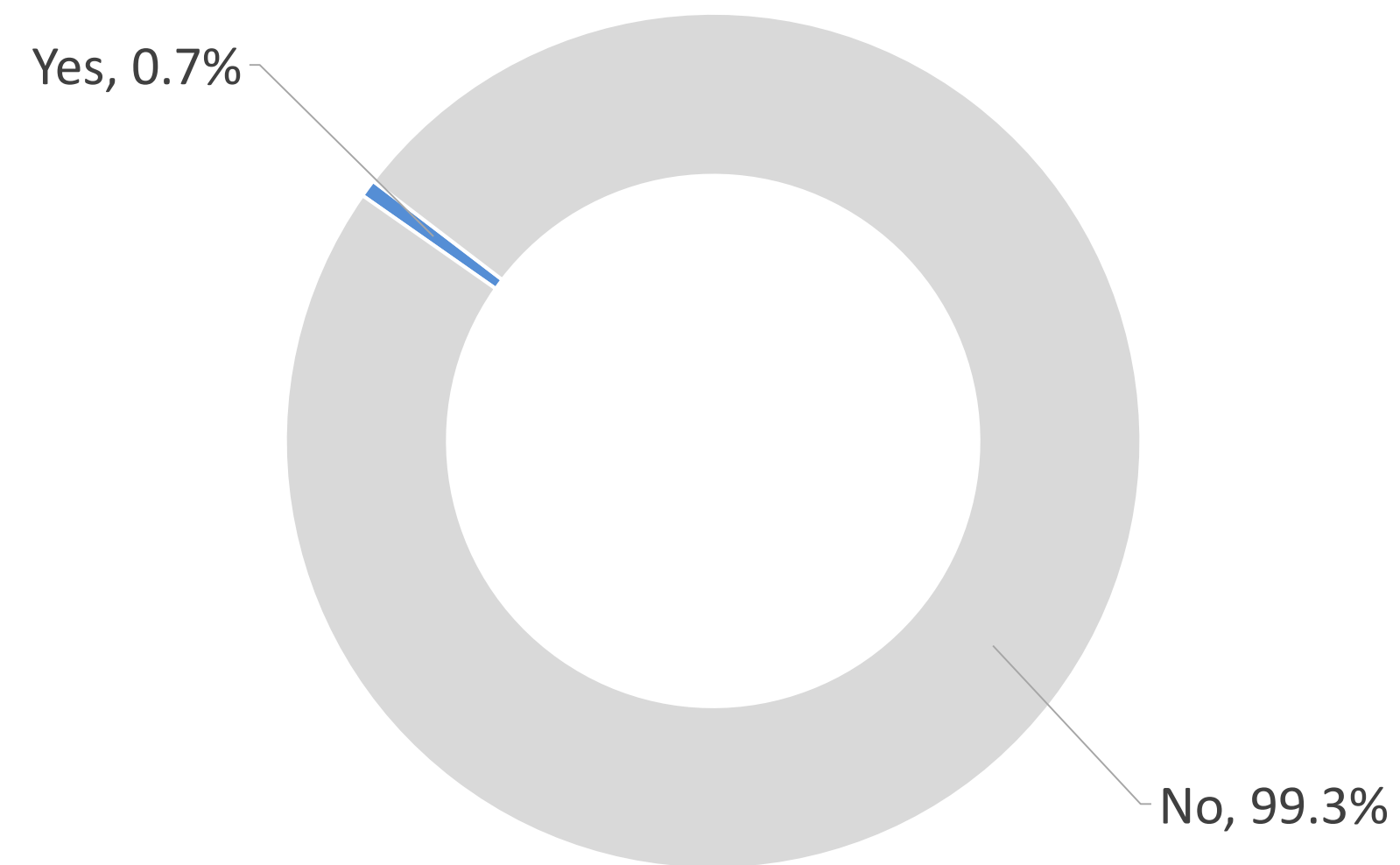
	Hotel	Home Share	VFR	Day Trip
Personal automobile	55.0%	66.7%	93.2%	75.6%
Rental car	26.5%	22.2%	3.4%	10.6%
Uber/Lyft	4.8%	11.1%	3.4%	0.8%
Taxi	2.0%	0.0%	1.1%	0.8%
Bicycle	0.0%	0.0%	1.1%	0.0%
Motorcycle	0.0%	0.0%	1.1%	0.0%
Sample Size:	558	9	88	254

Question: Which modes of transportation did you (or will you) use while in Billings?

Group Tour

A total of 0.7 percent of visitors surveyed were in Billings on a group tour.

Figure 24: Group Tour



Base: All respondents. 930 responses.

Detail by Type of Visitor

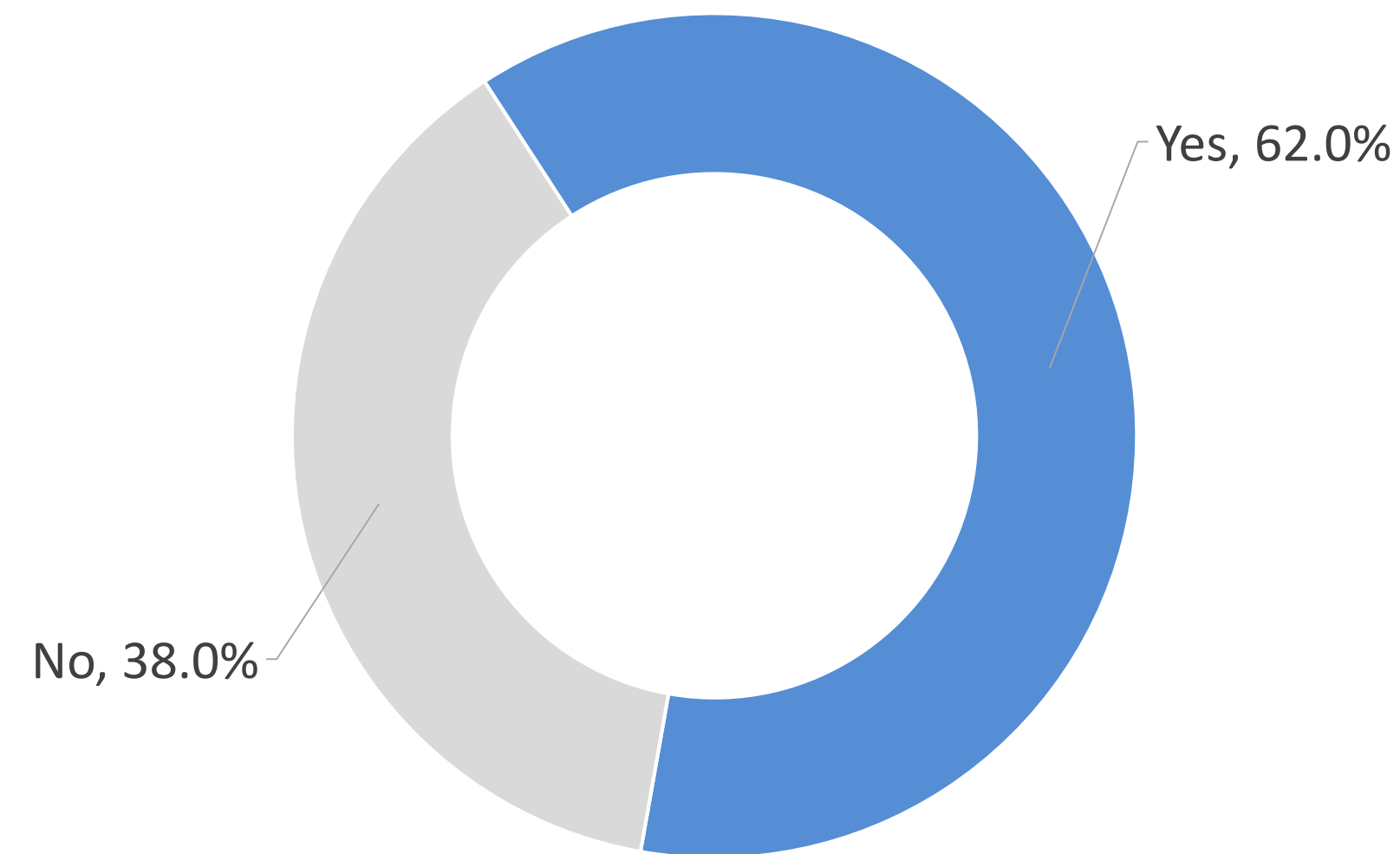
	Hotel	Home Share	VFR	Day Trip
Yes	2.0%	0.0%	0.0%	0.0%
No	98.0%	100.0%	100.0%	100.0%
Sample Size:	553	9	87	245

Question: Are you in Billings on an escorted group tour? Base: All respondents. 915 responses.

Billings as Sole Primary Destination of Trip

Over 60 percent of visitors surveyed reported that Billings was the sole primary destination for their trip (62.0%). Hotel guests and VFRs alike said Billings was the sole primary destination of their current trip (75.8% and 76.1%, respectively).

Figure 25: Billings as Sole Primary Destination of Trip



Base: All respondents. 928 responses.

Detail by Type of Visitor

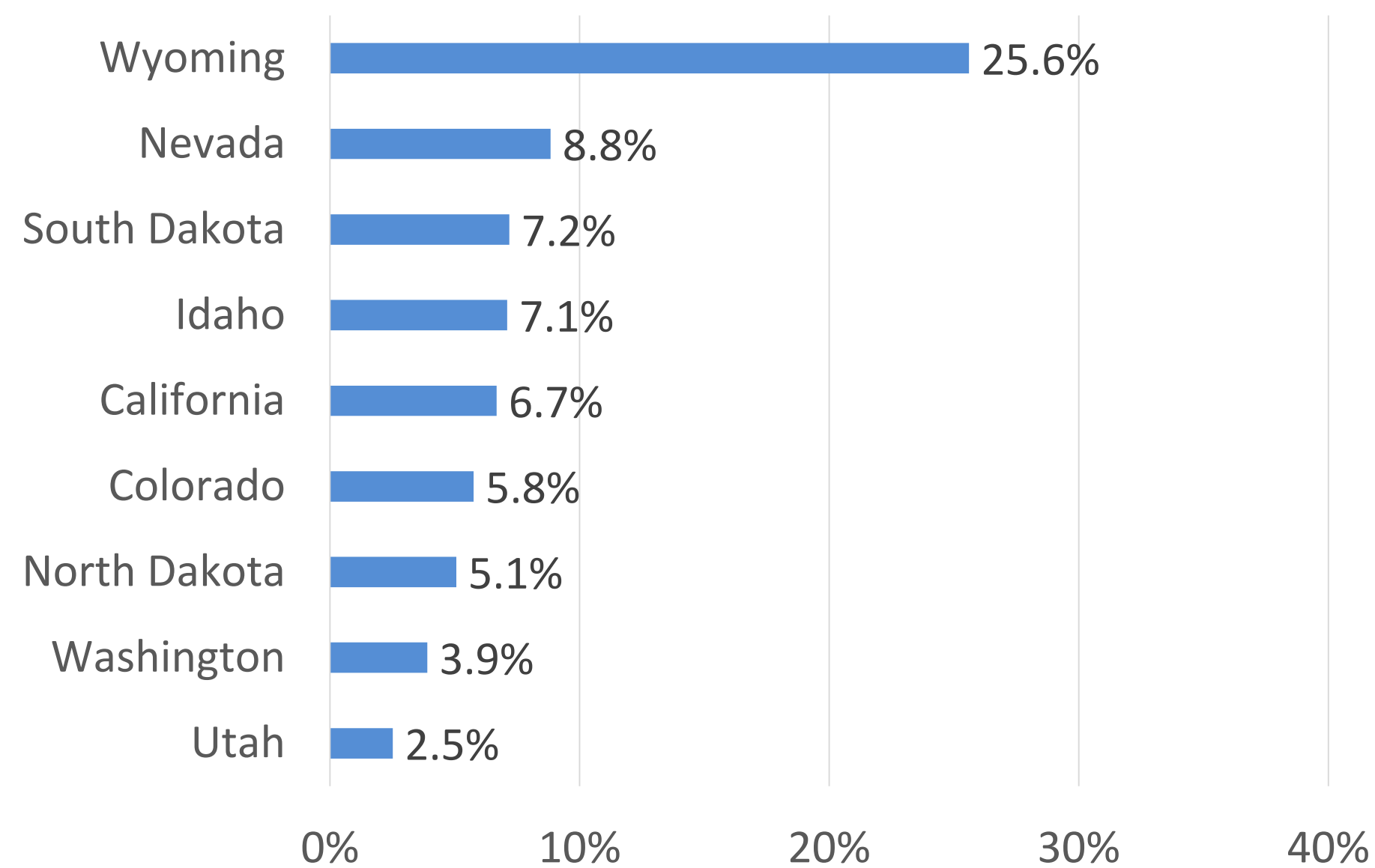
	Hotel	Home Share	VFR	Day Trip
Yes	75.8%	66.7%	76.1%	54.9%
No	24.2%	33.3%	23.9%	45.1%
Sample Size:	557	9	88	253

Question: Is Billings your sole primary destination for this trip you are currently on?

Other Destinations Visited as Part of Trip

Of the visitors who indicated they would be visiting other destinations as part of this trip, one-quarter were also planning to visit the state of Wyoming (25.6%). Visitors who indicated they would be visiting more than one destination were presented with a list of destinations and were asked which destinations they would be visiting as part of this trip. In addition to Wyoming, just under ten percent were traveling to Nevada (8.8%), followed by South Dakota (7.2%) and Idaho (7.1%). Hotel Guests were the most likely to visit destinations in Wyoming as a part of this trip compared to other visitor segments.

Figure 26: Other Destinations Visited as Part of Trip



Base: Respondents visiting multiple destinations on trip. 288 responses.

Detail by Type of Visitor

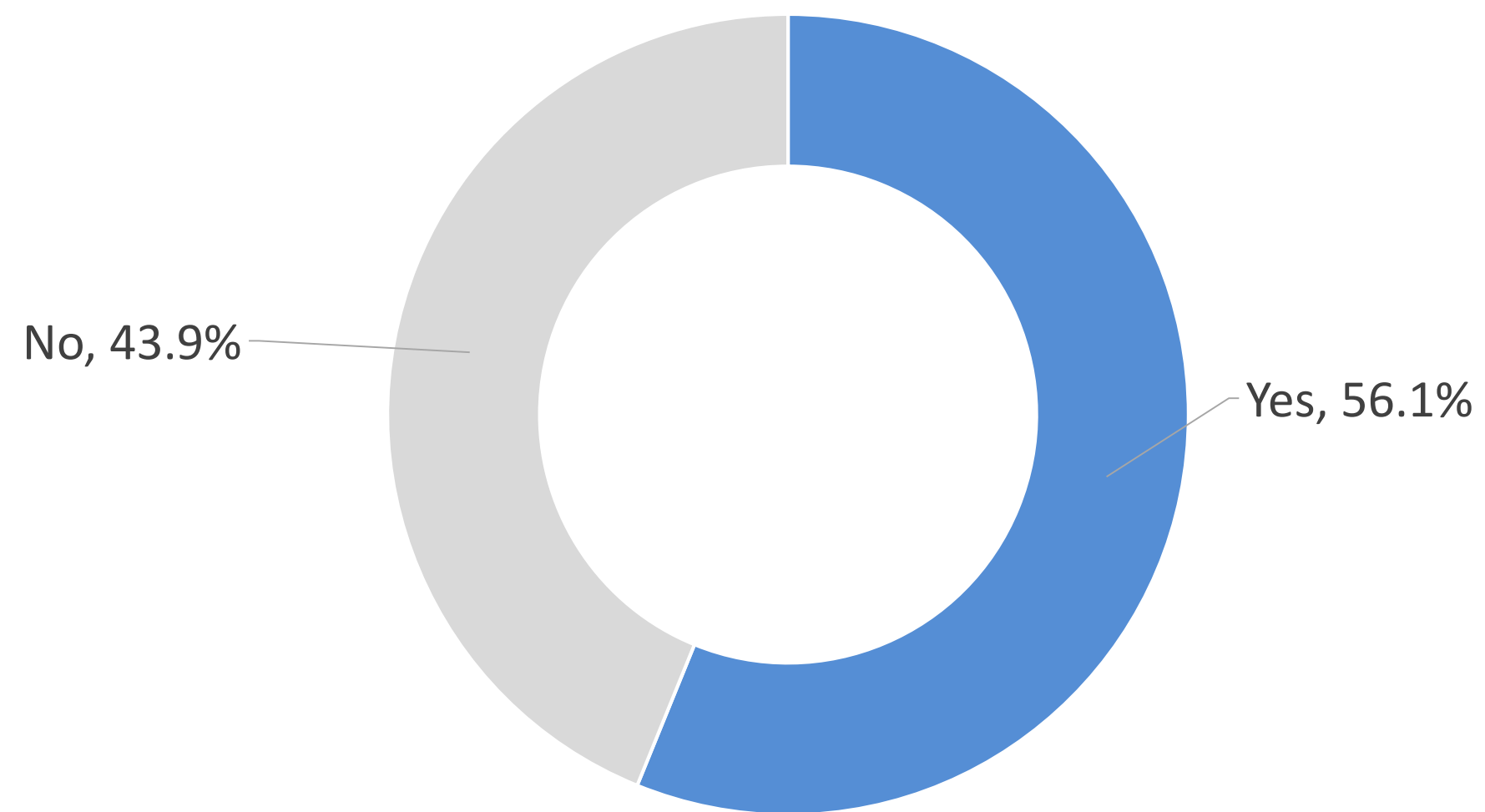
	Hotel	Home Share	VFR	Day Trip
Wyoming	41.5%	33.3%	23.8%	19.3%
Nevada	8.1%	0.0%	4.8%	8.8%
South Dakota	17.0%	0.0%	4.8%	4.4%
Idaho	17.0%	0.0%	9.5%	4.4%
California	7.4%	0.0%	4.8%	7.0%
Colorado	11.9%	0.0%	4.8%	3.5%
North Dakota	10.4%	66.7%	4.8%	2.6%
Washington	12.6%	0.0%	4.8%	1.8%
Utah	6.7%	0.0%	4.8%	1.8%
Sample Size:	135	3	21	114

Question: Will you be visiting destinations in any of these states as part of this trip? (Select all that apply)

Billings as First Destination of Trip

Nearly 60 percent of all visitors traveling to multiple destinations reported that Billings was the first destination of their trip (56.1%).

Figure 27: Billings as First Destination of Trip



Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Yes	45.0%	66.7%	66.7%	59.3%
No	55.0%	33.3%	33.3%	40.7%
Sample Size:	131	3	21	113

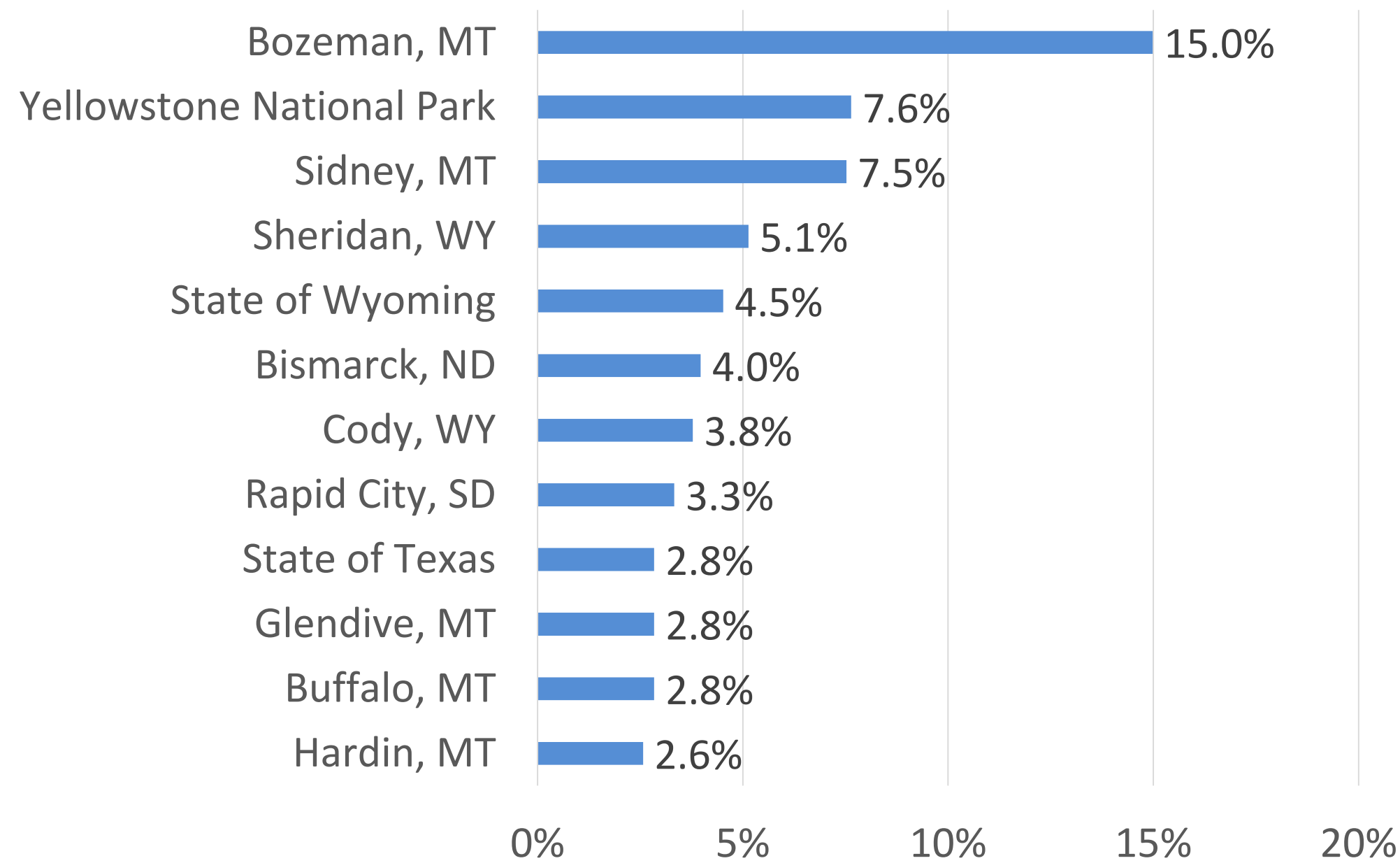
Base: Respondents visiting multiple destinations on trip. 283 responses.

Question: Is Billings the first destination of your trip?

Most Recent Destination of Trip (Unaided)

Visitors who reported traveling to another destination on this trip prior to arriving in Billings most frequently had gone to Bozeman, MT (15.0%). In an open-ended format, visitors were asked to list the most recent destination of their trip prior to arrival to Billings. In addition to Bozeman, MT, the next most commonly visited destinations were Yellowstone National Park (7.6%) and Sidney, MT (7.5%).

Figure 28: Most Recent Destination of Trip (Unaided)



Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Bozeman, MT	4.7%	0.0%	16.7%	24.0%
Yellowstone National Park	10.9%	0.0%	33.3%	4.0%
Sidney, MT	0.0%	0.0%	16.7%	12.0%
Sheridan, WY	3.1%	0.0%	0.0%	4.0%
State of Wyoming	7.8%	0.0%	0.0%	4.0%
Bismarck, ND	3.1%	100.0%	0.0%	4.0%
Cody, WY	3.1%	0.0%	0.0%	4.0%
Rapid City, SD	3.1%	0.0%	0.0%	4.0%
State of Texas	1.6%	0.0%	0.0%	4.0%
Glendive, MT	1.6%	0.0%	0.0%	4.0%
Buffalo, MT	1.6%	0.0%	0.0%	4.0%
Hardin, MT	1.6%	0.0%	0.0%	4.0%
Sample Size:	64	1	6	25

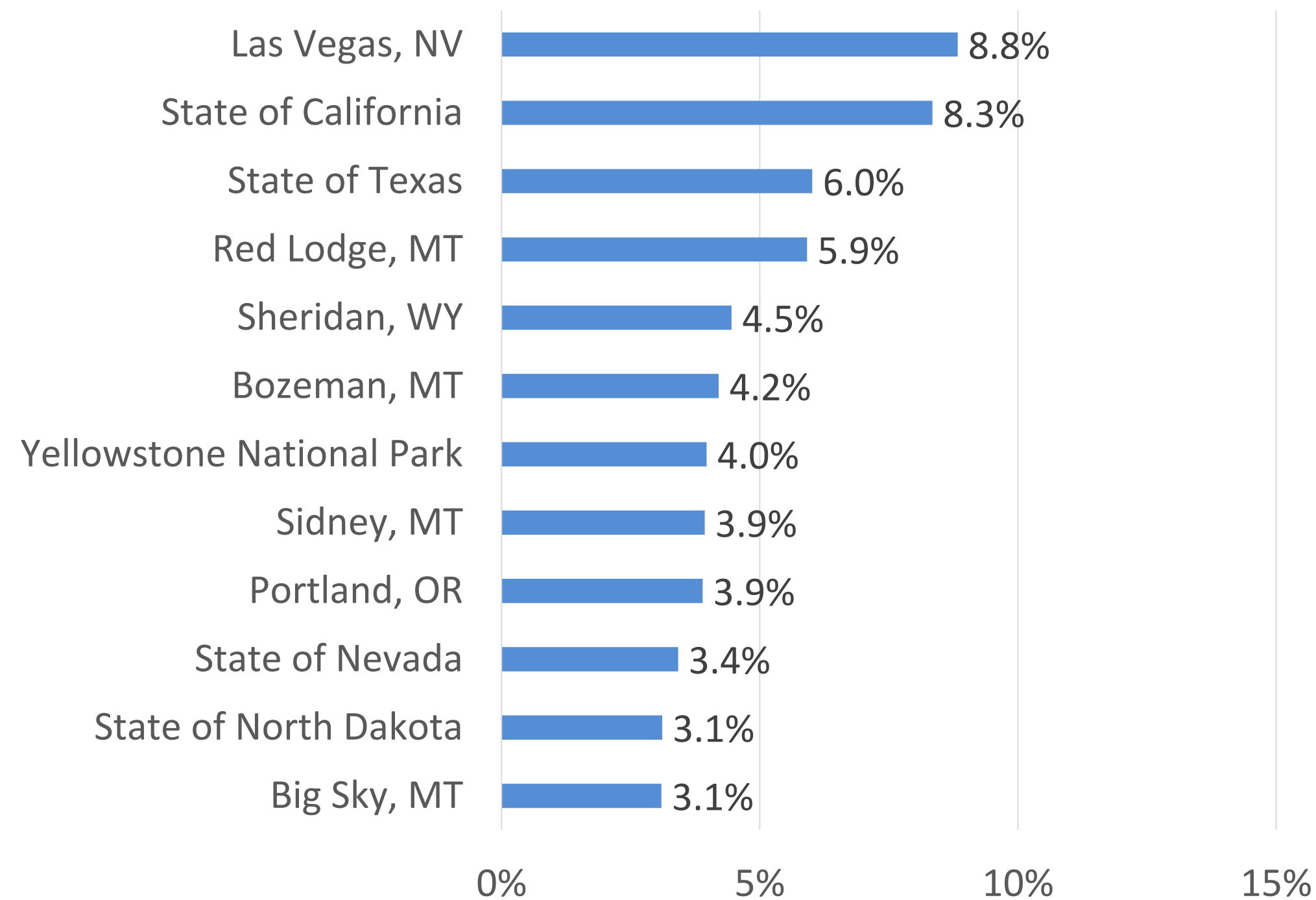
Base: Respondents who visited another destination before Billings on trip. 105 responses.

Question: What was the most recent destination you visited as part of this trip, prior to arriving in Billings?

Next Destination of Trip (Unaided)

Visitors going to multiple destinations on their trip most commonly planned to visit Las Vegas (8.8%) or California (8.3%) after departing Billings. Other frequently named destinations were Texas (6.0%), Red Lodge, MT (5.9%) and Sheridan, WY (4.5%).

Figure 29: Next Destination of Trip (Unaided)



Base: Respondents visiting multiple destinations on trip. 193 responses.

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Las Vegas, NV	0.0%	0.0%	7.1%	10.9%
State of California	3.0%	0.0%	7.1%	10.9%
State of Texas	3.0%	0.0%	0.0%	7.8%
Red Lodge, MT	2.0%	50.0%	0.0%	7.8%
Sheridan, WY	4.0%	0.0%	7.1%	4.7%
Bozeman, MT	9.0%	0.0%	0.0%	3.1%
Yellowstone National Park	12.0%	50.0%	7.1%	0.0%
Sidney, MT	3.0%	0.0%	0.0%	4.7%
Portland, OR	2.0%	0.0%	7.1%	4.7%
State of Nevada	1.0%	0.0%	0.0%	4.7%
State of North Dakota	2.0%	0.0%	0.0%	3.1%
Big Sky, MT	4.0%	0.0%	7.1%	3.1%
Sample Size:	100	2	14	64

Question: What is the next destination of your trip?

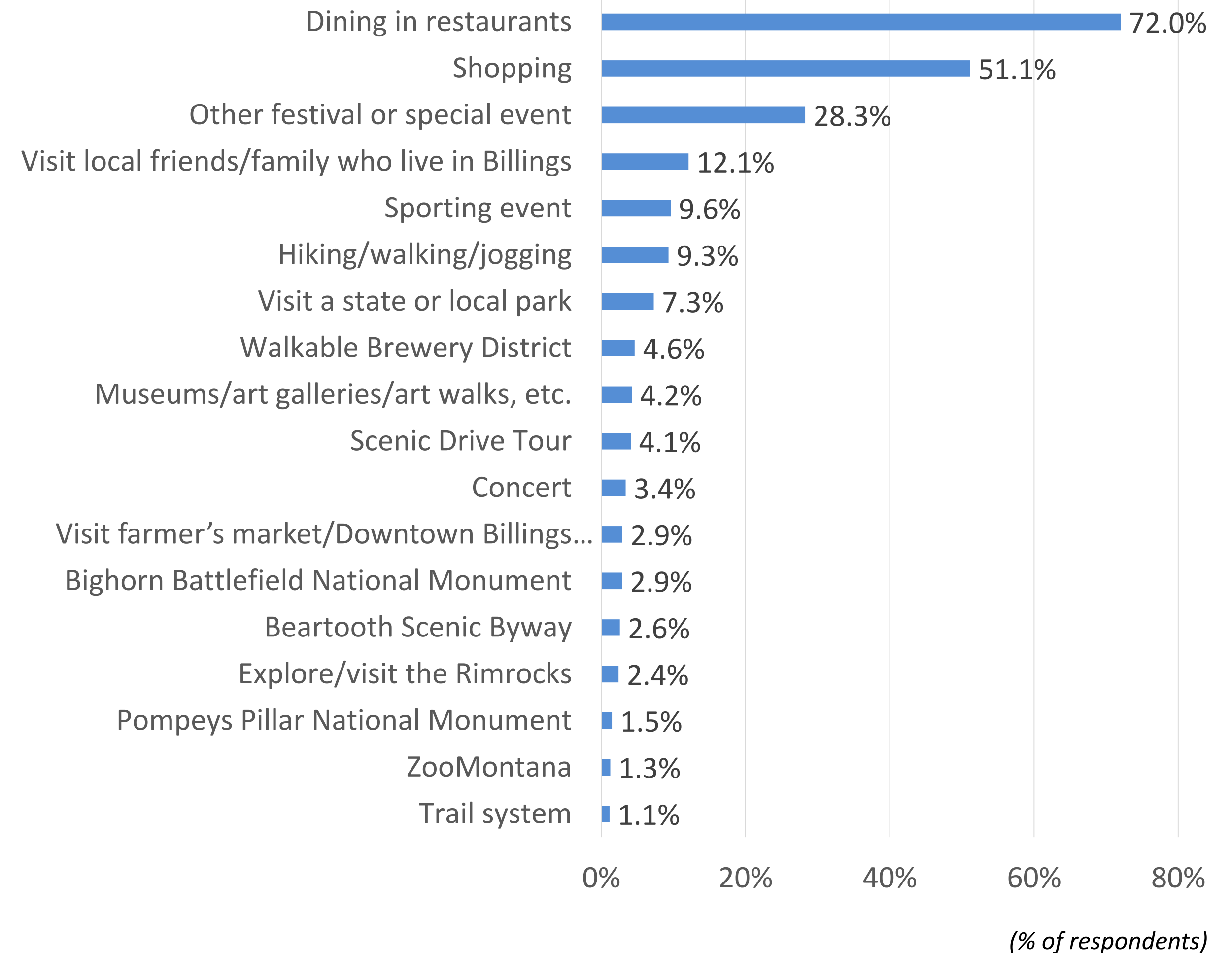
Activities Participated in During Billings Trip

Visitors most commonly dined in restaurants and/or went shopping while in the Billings area. Visitors surveyed were presented with a list of 26 activities and asked which they participated in during their time in the destination. Of the activities tested, dining in restaurants (72.0%) was the top activity visitors participated in while in the Billings area. Additionally, 51.1 percent of visitors went shopping, 28.3 percent attended a festival or other special event, and 12.1 percent visited local friends or family during their time in Billings. On average, survey respondents participated in 2.2 different activities while visiting the destination.

Full detail on activities tested segmented by type of visitor is presented on the next page.

Question: Which of these activities did you (or will you) participate in while in Billings?
 Base: All respondents. 930 responses.

Figure 30: Activities Participated in During Billings Trip



Activities Participated in During Billings Trip – Complete Detail

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Dining in restaurants	90.7%	88.9%	80.7%	64.2%
Shopping	53.8%	44.4%	64.8%	49.2%
Other festival or special event	19.7%	55.6%	31.8%	31.5%
Visit local friends/family who live in Billings	12.2%	33.3%	56.8%	8.3%
Sporting event	16.3%	11.1%	18.2%	5.9%
Hiking/walking/jogging	17.2%	33.3%	21.6%	3.9%
Visit a state or local park	10.0%	44.4%	15.9%	3.9%
Walkable Brewery District	10.9%	11.1%	9.1%	1.2%
Museums/art galleries/art walks, etc.	8.1%	33.3%	6.8%	1.2%
Scenic Drive Tour	7.7%	11.1%	2.3%	2.4%
Concert	4.5%	0.0%	5.7%	2.4%
Visit farmer's market/Downtown Billings event	4.1%	22.2%	10.2%	1.6%
Bighorn Battlefield National Monument	5.6%	11.1%	1.1%	1.2%
Beartooth Scenic Byway	3.2%	0.0%	4.5%	1.6%
Explore/visit the Rimrocks	3.8%	11.1%	8.0%	1.2%
Pompeys Pillar National Monument	3.4%	0.0%	2.3%	0.4%
ZooMontana	3.6%	0.0%	4.5%	0.0%
Trail system	2.0%	0.0%	1.1%	0.4%
Guided tours	1.3%	0.0%	0.0%	0.4%
Water activity on Yellowstone/other river/creek	0.7%	0.0%	2.3%	0.0%
Horseback riding	1.3%	0.0%	1.1%	0.0%
Performing arts (theater, live music, etc.)	1.3%	0.0%	1.1%	0.0%
Golf	1.1%	0.0%	0.0%	0.0%
Spa visit or treatment	0.9%	0.0%	0.0%	0.0%
Biking	0.4%	0.0%	1.1%	0.0%
Bike or Segway rental	0.2%	0.0%	0.0%	0.0%
Sample Size:	558	9	88	254

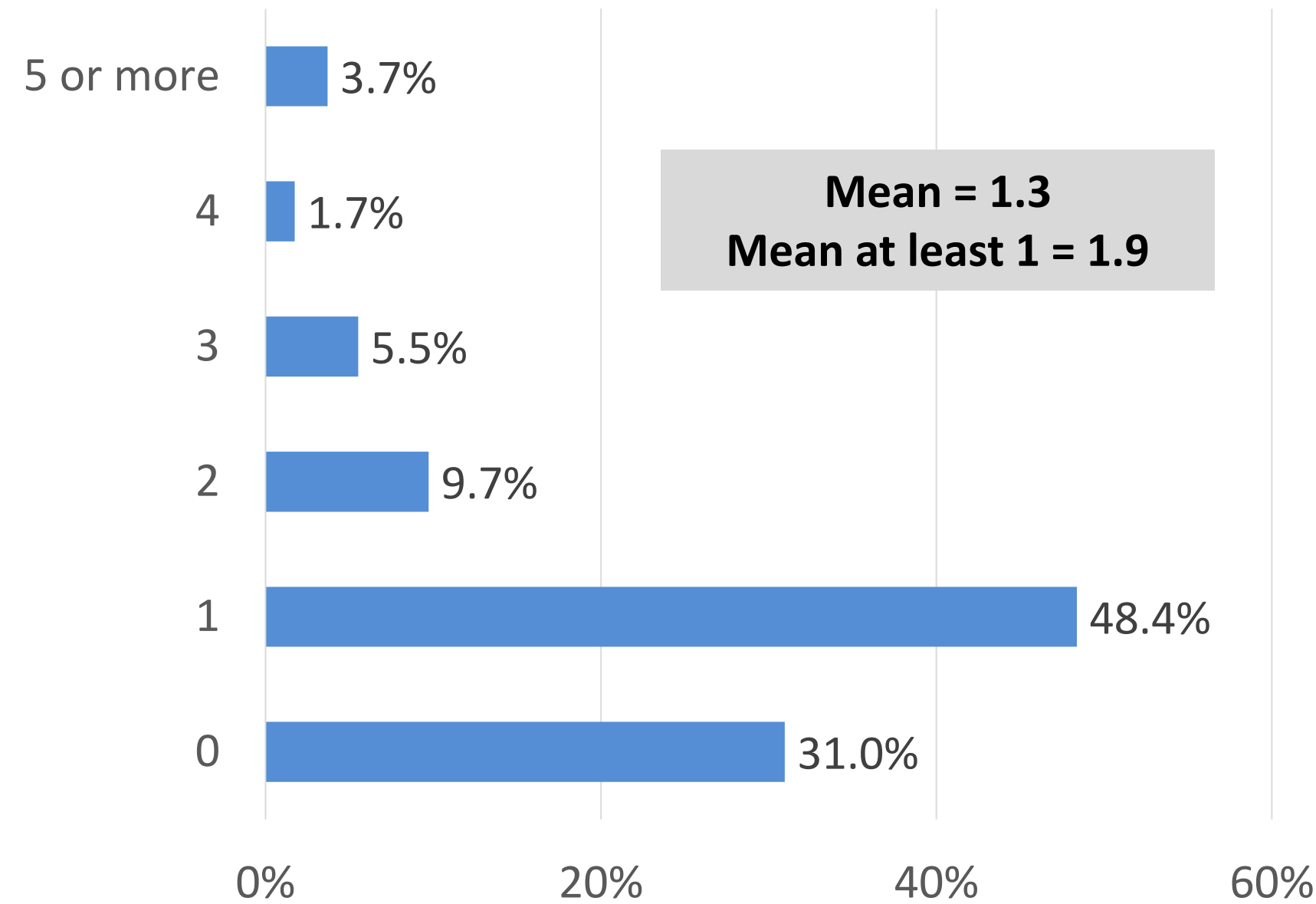
Question: Which of these activities did you (or will you) participate in while in Billings?

Base: All respondents. 930 responses.

Brewery Visits

Visitors went to an average of 1.3 breweries or distilleries while in Billings.

Figure 31: Brewery Visits



Base: All respondents. 257 responses.

Detail by Type of Visitor

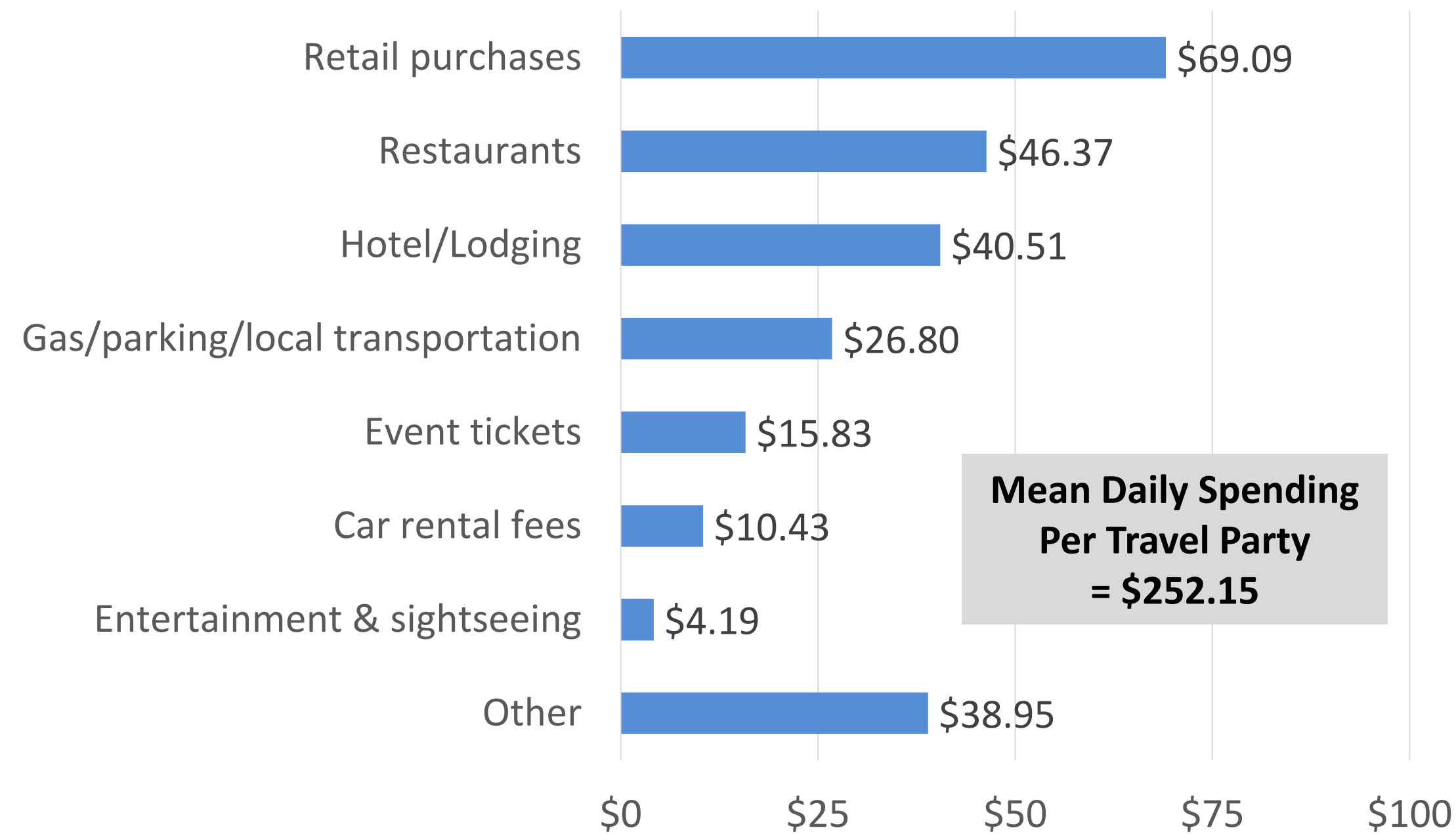
	Hotel	Home Share	VFR	Day Trip
5 or more	5.2%	0.0%	3.3%	3.1%
4	4.0%	0.0%	0.0%	0.0%
3	7.5%	20.0%	10.0%	0.0%
2	20.7%	0.0%	6.7%	0.0%
1	44.3%	60.0%	46.7%	59.4%
0	18.4%	20.0%	33.3%	37.5%
Mean:	1.5	1.2	1.1	1.2
Mean at least 1:	1.9	1.5	1.6	2.0
Sample Size:	174	5	30	32

Question: How many breweries or distilleries in Billings did you (or will you) visit during your trip?

Daily Trip Spending, Per Travel Party

Visiting travel parties spent an average of \$252.15 in the Billings area per trip day. The largest proportion of this spending was on retail purchases (\$69.09) followed by restaurants (\$46.37), hotel/lodging (\$40.51) and gas, parking and local transportation (\$26.80). Hotel guests represented the greatest daily spend, averaging \$341.09 per travel party.

Figure 32: Daily Trip Spending, Per Travel Party



Base: All respondents. 884 responses.

Detail by Type of Visitor

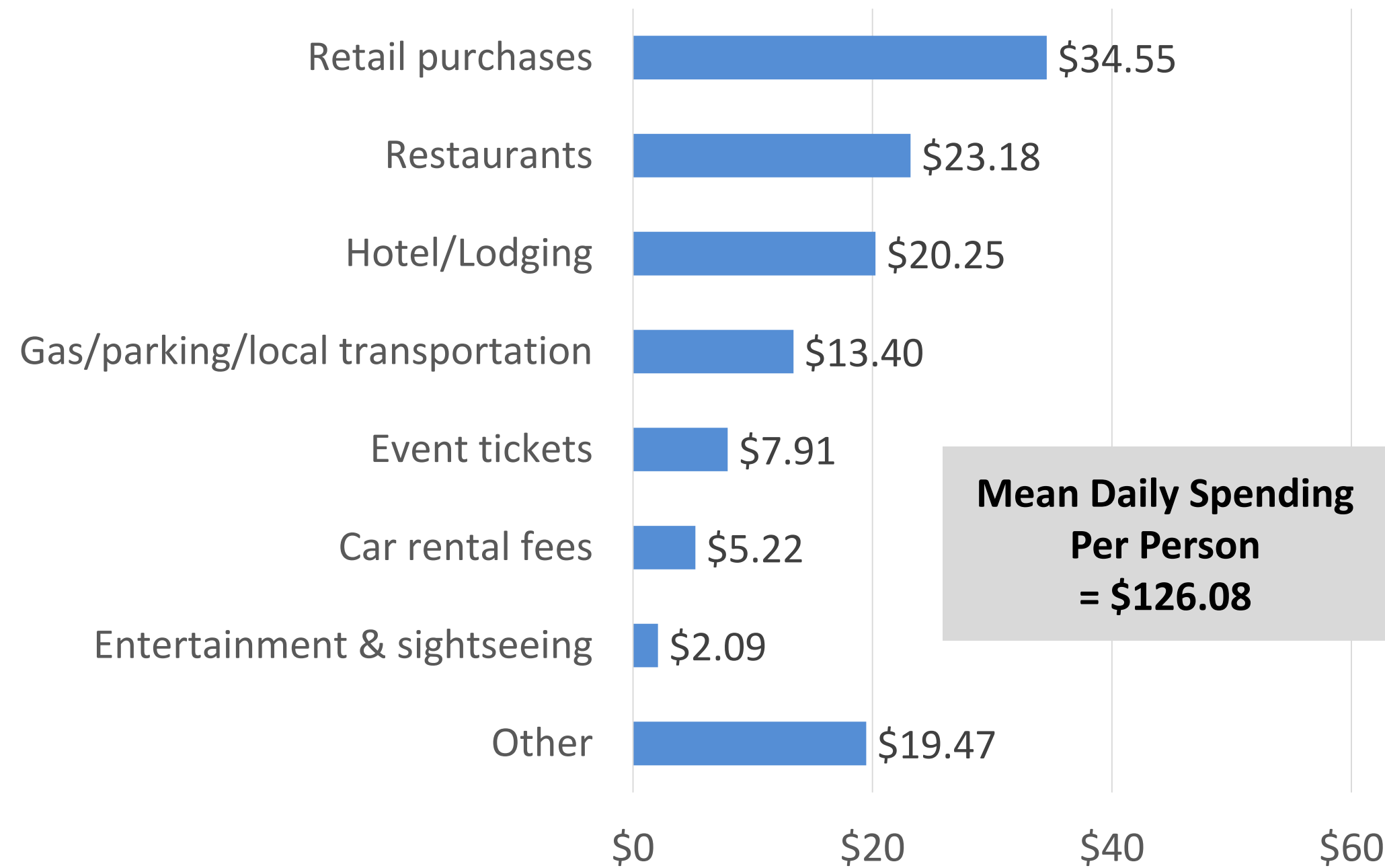
	Hotel	Home Share	VFR	Day Trip
Retail purchases	\$76.27	\$61.67	\$74.67	\$66.55
Restaurants	\$67.58	\$83.89	\$52.62	\$34.94
Hotel/Lodging	\$111.36	\$43.89	\$4.79	\$7.02
Gas/parking/local transportation	\$34.97	\$23.89	\$25.49	\$21.86
Event tickets	\$13.89	\$24.44	\$13.65	\$16.68
Car rental fees	\$11.89	\$0.00	\$1.88	\$8.80
Entertainment & sightseeing	\$8.41	\$5.56	\$5.00	\$1.67
Other	\$16.71	\$2.78	\$26.45	\$52.49
Mean Spending Per Travel Party:	\$341.09	\$246.11	\$204.55	\$210.01
Sample Size:	541	9	85	229

Question: PER DAY, approximately how much will you spend on each of the following while in Billings?

Daily Trip Spending, Per Person

It is estimated that the average Billings area visitor represents **\$126.08** in daily in-market spending. This is based on the reported daily spending of \$252.15 covering an average of 2.0 travelers. When comparing spending by visitor type, Hotel Guests spend considerably more per person than the other segments.

Figure 33: Daily Trip Spending, Per Person



Base: All respondents. 884 responses.

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Retail purchases	\$38.39	\$24.67	\$41.26	\$32.98
Restaurants	\$34.01	\$33.56	\$29.08	\$17.31
Hotel/Lodging	\$56.05	\$17.56	\$2.65	\$3.48
Gas/parking/local transportation	\$17.60	\$9.56	\$14.09	\$10.83
Event tickets	\$6.99	\$9.78	\$7.54	\$8.27
Car rental fees	\$5.98	\$0.00	\$1.04	\$4.36
Entertainment & sightseeing	\$4.23	\$2.22	\$2.76	\$0.83
Other	\$8.41	\$1.11	\$14.62	\$26.01
Mean # of People Covered by Spending:	2.0	2.5	1.8	2.0
Mean Daily Spending Per Person:	\$171.67	\$98.44	\$113.04	\$104.07
Sample Size:	541	9	85	229

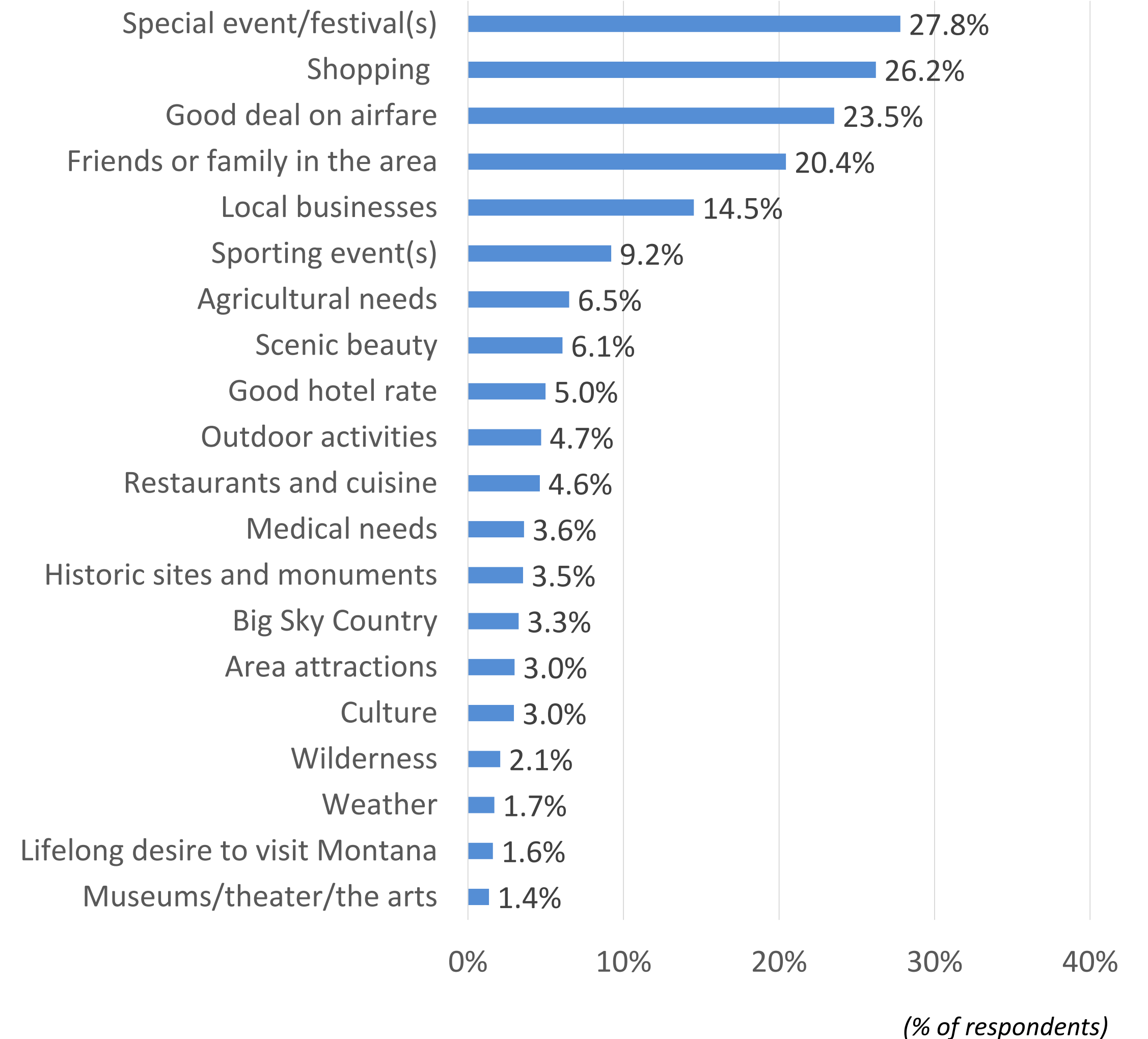
Question: These expenses fully cover how many people, including yourself?

Important Factors Motivating Trip to Billings

The most important factors motivating visitors to come to the Billings area were special event/festival (27.8%), shopping opportunities (26.2%), a good deal on airfare (23.5%) and friends or family in the area (20.4%). Visitors surveyed were presented with a list of 24 motivating factors and were asked to identify the most important factors to their decision to take a trip to the area. Other top factors important to visitors' decision to take a trip to the Billings area included local businesses (14.5%) and sporting events (9.2%).

Full detail on factors tested segmented by type of visitor are presented on the next page.

Figure 34: Important Factors Motivating Trip to Billings



Question: Which of the following were IMPORTANT to your decision to take this trip to Billings? (Select all that apply) Base: All respondents. 930 responses.

Important Factors Motivating Trip to Billings – Complete Detail

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Special event/festival(s)	18.6%	55.6%	26.1%	32.3%
Shopping	18.3%	11.1%	21.6%	31.1%
Good deal on airfare	8.1%	0.0%	14.8%	32.3%
Friends or family in the area	17.4%	55.6%	79.5%	17.3%
Local businesses	30.5%	0.0%	8.0%	7.9%
Sporting event(s)	15.6%	22.2%	15.9%	5.9%
Agricultural needs	6.6%	0.0%	3.4%	6.7%
Scenic beauty	9.1%	11.1%	6.8%	4.3%
Good hotel rate	15.9%	11.1%	0.0%	0.4%
Outdoor activities	6.3%	22.2%	8.0%	3.1%
Restaurants and cuisine	7.9%	0.0%	1.1%	3.5%
Medical needs	3.2%	22.2%	10.2%	3.1%
Historic sites and monuments	5.4%	0.0%	2.3%	2.8%
Big Sky Country	3.0%	11.1%	3.4%	3.1%
Area attractions	4.1%	11.1%	4.5%	2.4%
Culture	3.8%	0.0%	2.3%	2.4%
Wilderness	2.5%	0.0%	1.1%	1.6%
Weather	2.5%	0.0%	6.8%	0.8%
Lifelong desire to visit Montana	4.1%	0.0%	1.1%	0.4%
Museums/theater/the arts	2.7%	0.0%	1.1%	0.8%
Billings' historical attributes	1.4%	0.0%	0.0%	0.4%
Ambiance and atmosphere	1.4%	0.0%	0.0%	0.4%
Desire to visit Billings	0.4%	0.0%	0.0%	0.4%
Information from Visit Billings	0.2%	0.0%	0.0%	0.0%
Sample Size:	541	9	85	229

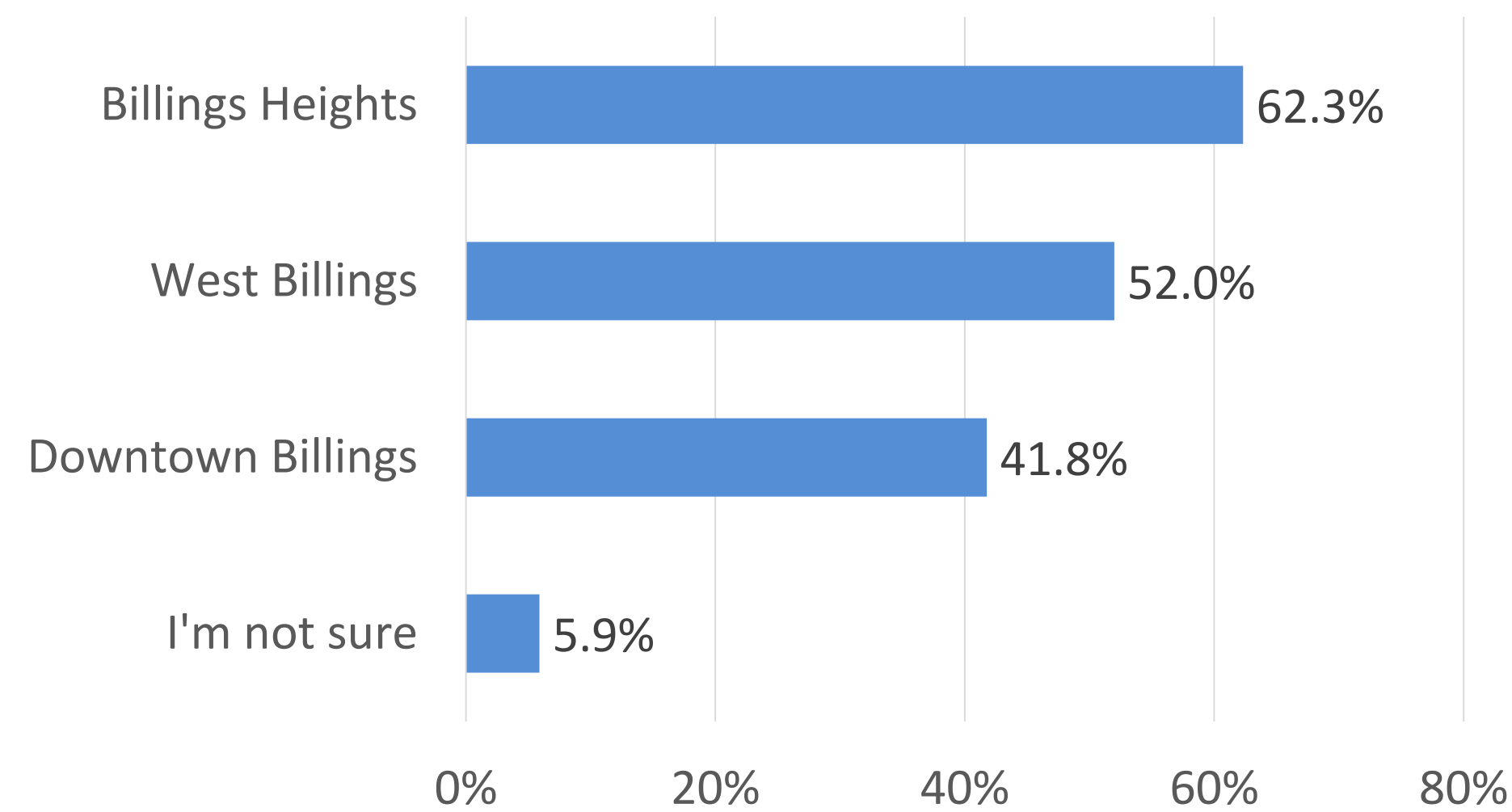
Question: Which of the following were IMPORTANT to your decision to take this trip to Billings? (Select all that apply)

Base: All respondents. 930 responses.

Areas Visited While in Billings

The Billings Heights area within Billings received the highest visitation of the areas tested, with nearly two-thirds of visitors reporting going to this area (62.3%). Over half of all visitors also went to West Billings (52.0%), while just over four-in-ten visited downtown Billings (41.8%). Day Trip visitors were the most likely to visit Billings Heights (74.8%), while Hotel Guests were the least likely to visit (37.8%). Hotel Guests most commonly visited downtown Billings (67.9%) and West Billings (64.0%).

Figure 35: Areas Visited While in Billings



Base: All respondents. 930 responses.

Detail by Type of Visitor

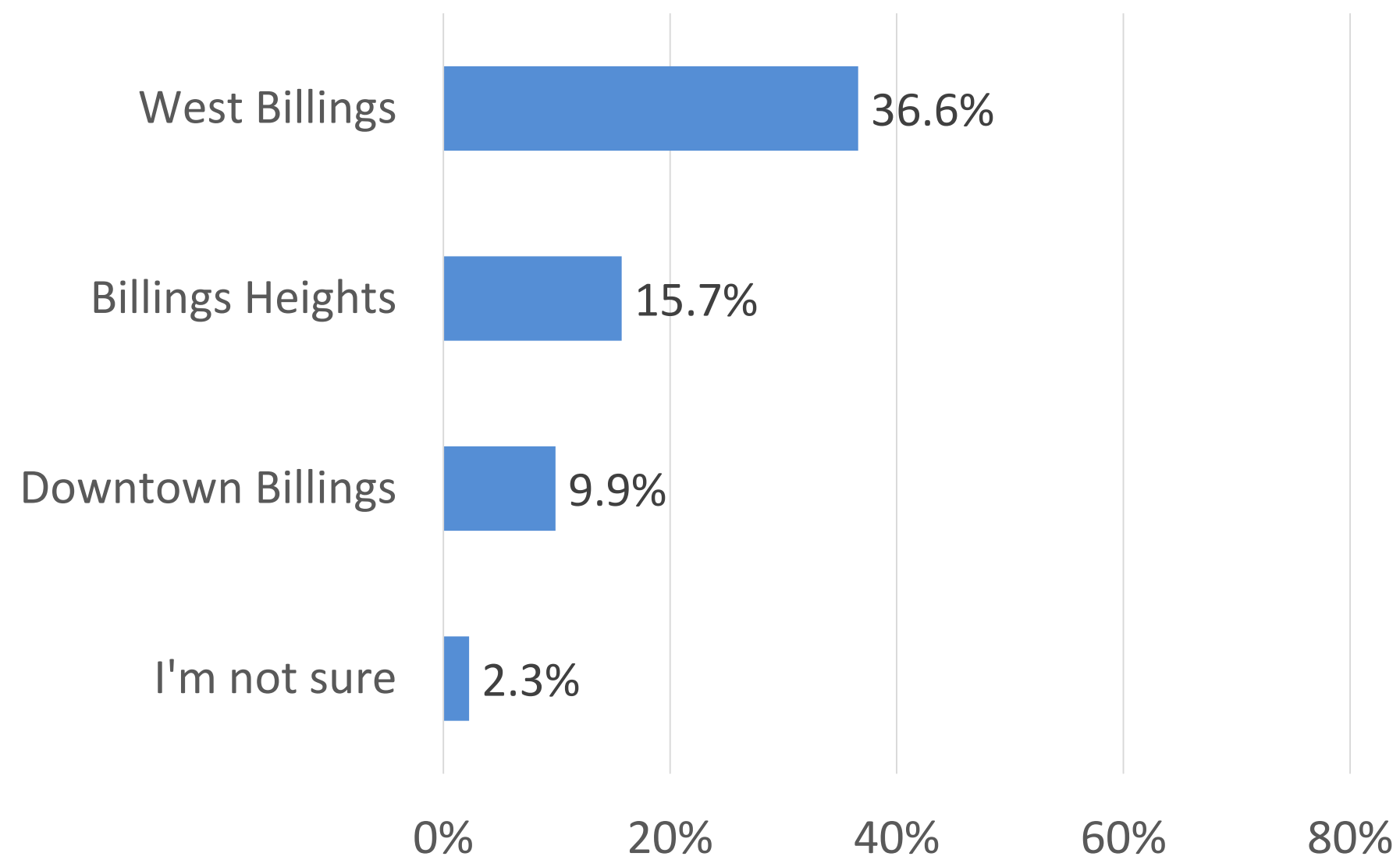
	Hotel	Home Share	VFR	Day Trip
Billings Heights	37.8%	44.4%	59.1%	74.8%
West Billings	64.0%	77.8%	85.2%	43.7%
Downtown Billings	67.9%	77.8%	50.0%	28.0%
I'm not sure	3.4%	11.1%	5.7%	7.1%
Sample Size:	558	9	88	254

Question: During your time in Billings, did you (or will you) visit, shop, dine or attend events in any of these areas within Billings/Yellowstone County? (Select each appropriate option below)

Areas Shopped While in Billings

West Billings was the most commonly shopped area amongst visitors surveyed, attracting 36.6% of visitors to this area's stores. The VFR segment was the most likely to shop in West Billings, with 62.5 percent reporting that they had shopped in the area or were planning to.

Figure 36: Areas Shopped While in Billings



Base: All respondents. 930 responses.

Detail by Type of Visitor

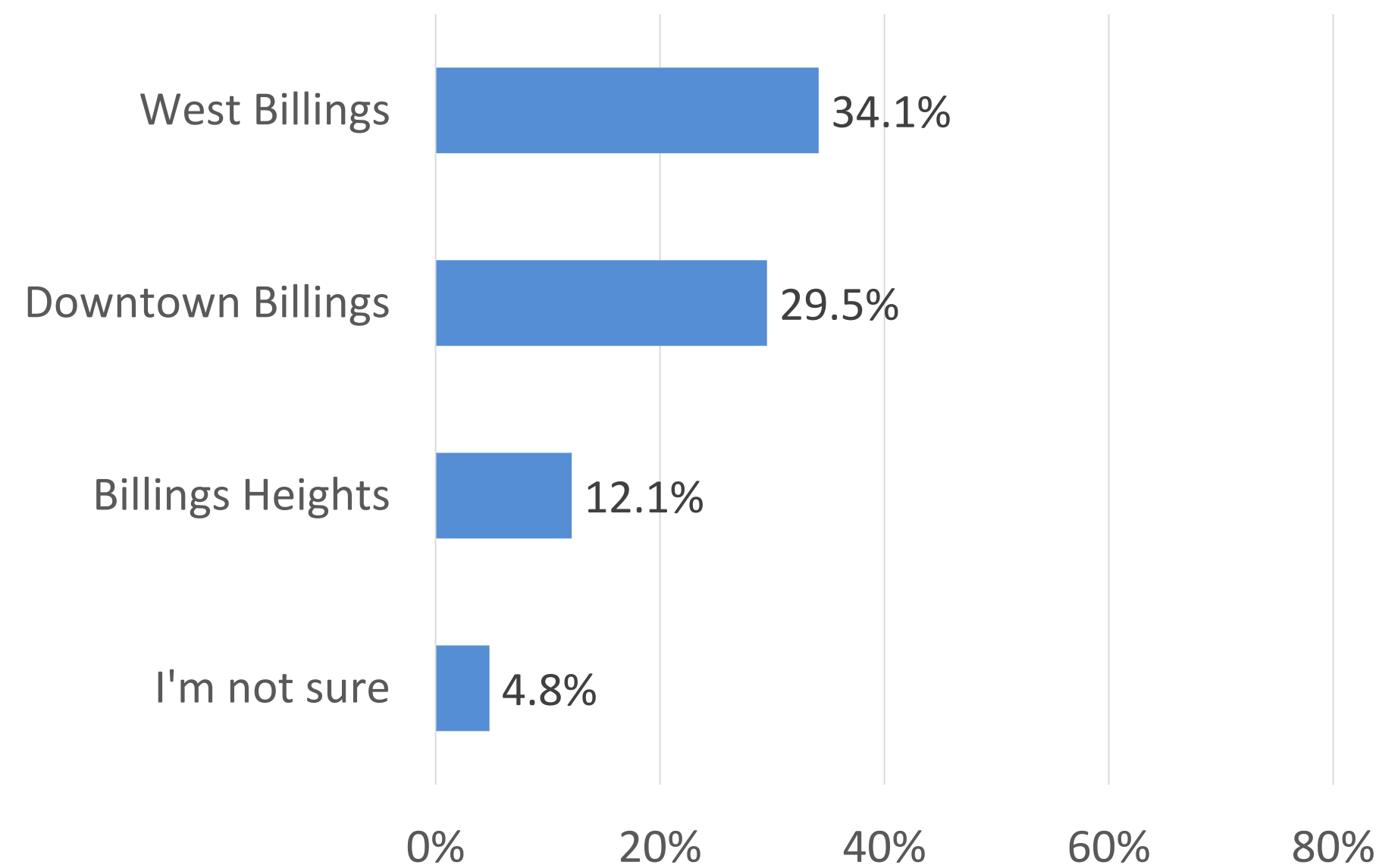
	Hotel	Home Share	VFR	Day Trip
West Billings	41.2%	44.4%	62.5%	32.7%
Billings Heights	9.0%	0.0%	22.7%	18.9%
Downtown Billings	21.5%	44.4%	14.8%	3.9%
I'm not sure	2.7%	11.1%	3.4%	2.0%
Sample Size:	558	9	88	254

Question: During your time in Billings, did you (or will you) visit, shop, dine or attend events in any of these areas within Billings/Yellowstone County? (Select each appropriate option below)

Areas Dined In While in Billings

West Billings was the most commonly dined in area, with 34.1 percent of visitors reporting dining in this area. Three-in-ten visitors dined in downtown Billings (29.5%), and just over one-in-ten dined in Billings Heights (12.1%). Those visiting friends and/or relatives were the most likely to dine in West Billings (59.1%), while Home Share Guests and Hotel Guests were more likely to dine in downtown Billings (66.7% and 53.2%, respectively).

Figure 37: Areas Dined In While in Billings



Base: All respondents. 930 responses.

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
West Billings	47.1%	44.4%	59.1%	26.4%
Downtown Billings	53.2%	66.7%	28.4%	18.1%
Billings Heights	11.1%	0.0%	20.5%	12.6%
I'm not sure	1.1%	11.1%	2.3%	6.7%
Sample Size:	558	9	88	254

Question: During your time in Billings, did you (or will you) visit, shop, dine or attend events in any of these areas within Billings/Yellowstone County? (Select each appropriate option below)

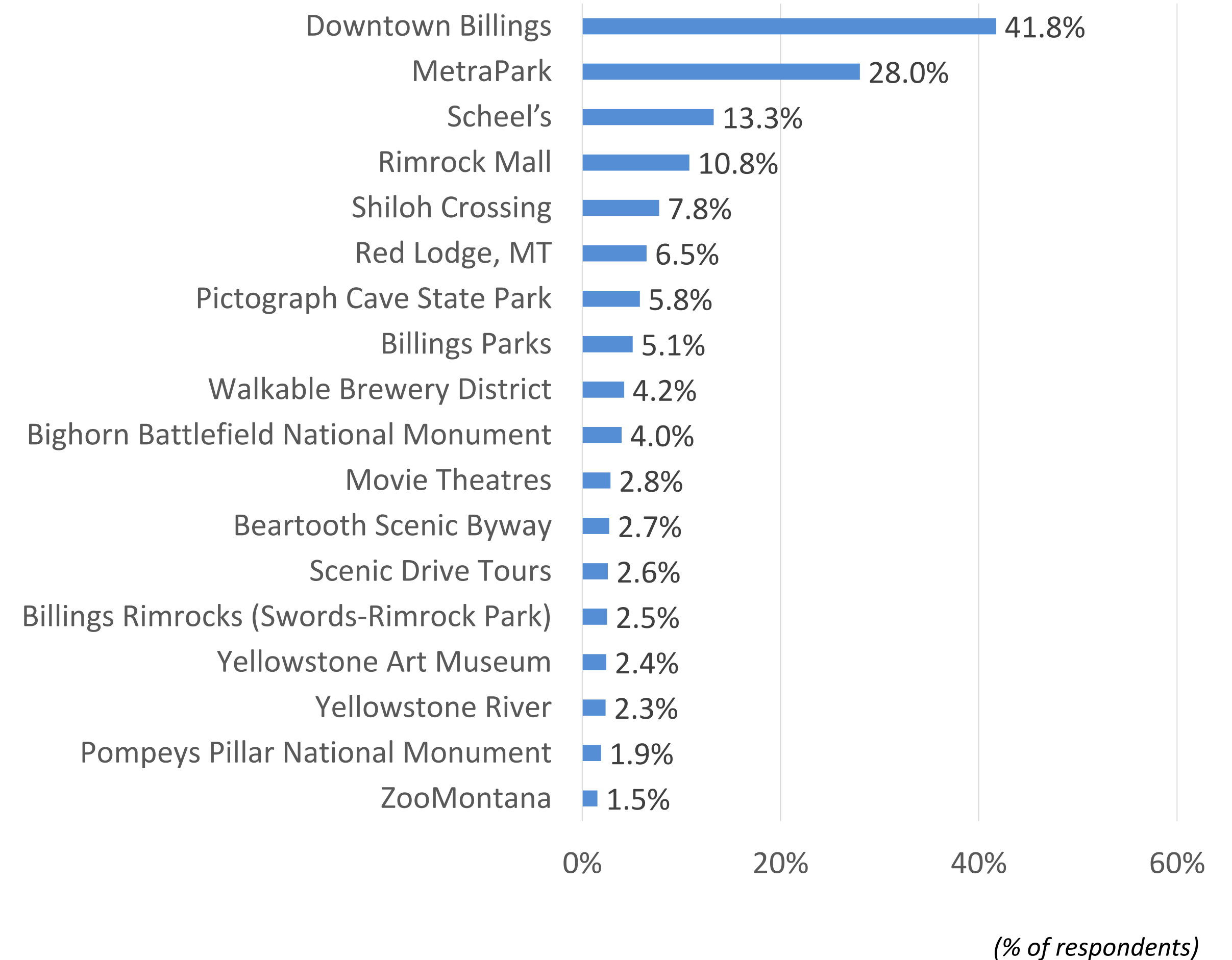
Attractions Visited While in Billings

Of attractions tested, Downtown Billings was the most-visited attraction, with over 40 percent of visitors reporting that they visited (or intended to visit) the area (41.8%). Visitors surveyed were presented with a list of 32 attractions and were asked to select those that they visited or would be visiting during their trip to the Billings area. In addition to Downtown Billings, the next most-visited attractions amongst visitors were MetraPark (28.0%), Scheel’s (13.3%) and Rimrock Mall (10.8%). Day Trippers were the most likely to visit MetraPark (33.1%). On average, visitors went to 2.0 attractions during their trip to the Billings area.

Full list of attractions tested and segmented by type of visitor is presented on the next page.

Question: Which of the following attractions did you (or will you) visit while on this trip? (Select all that apply) Base: All respondents. 930 responses.

Figure 38: Attractions Visited while in Billings



Attractions Visited – Complete Detail

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Downtown Billings	67.9%	77.8%	50.0%	28.0%
MetraPark	19.2%	11.1%	26.1%	33.1%
Scheel's	20.3%	0.0%	31.8%	9.4%
Rimrock Mall	15.9%	33.3%	26.1%	7.1%
Shiloh Crossing	10.9%	0.0%	21.6%	5.5%
Red Lodge, MT	5.9%	11.1%	8.0%	6.3%
Pictograph Cave State Park	6.1%	22.2%	8.0%	4.3%
Billings Parks	6.8%	44.4%	14.8%	2.8%
Walkable Brewery District	9.9%	22.2%	5.7%	1.2%
Bighorn Battlefield National Monument	7.3%	11.1%	3.4%	1.6%
Movie Theatres	4.7%	11.1%	6.8%	1.6%
Beartooth Scenic Byway	3.8%	0.0%	4.5%	1.6%
Scenic Drive Tours	4.7%	0.0%	2.3%	1.6%
Billings Rimrocks (Swords-Rimrock Park)	4.8%	22.2%	5.7%	0.8%
Yellowstone Art Museum	3.4%	22.2%	5.7%	1.2%
Yellowstone River	4.1%	0.0%	5.7%	1.2%
Pompeys Pillar National Monument	3.6%	0.0%	3.4%	0.8%
ZooMontana	4.1%	0.0%	5.7%	0.0%
College or University	1.8%	0.0%	3.4%	0.4%
Mustangs Baseball	2.0%	0.0%	1.1%	0.4%
Yellowstone County Museum	1.8%	0.0%	0.0%	0.4%
Bighorn Canyon National Recreation Area	2.0%	0.0%	0.0%	0.4%
The Moss Mansion	1.8%	11.1%	2.3%	0.0%
West Park Promenade	0.7%	11.1%	3.4%	0.4%
Alberta Bair Theater	2.0%	0.0%	2.3%	0.0%
Billings Historic Depot	1.4%	0.0%	0.0%	0.4%
Western Heritage Center	1.6%	11.1%	0.0%	0.0%
Yellowstone Kelly Interpretive Site	1.3%	0.0%	1.1%	0.0%
Arthouse	0.4%	0.0%	2.3%	0.0%
Visitor Information Center (Billings)	0.5%	0.0%	0.0%	0.0%
NOVA Performing Arts	0.2%	0.0%	0.0%	0.0%
Babcock Theatre	0.0%	0.0%	0.0%	0.0%
Mean # of Attractions Visited:	2.4	3.0	2.8	1.6
Sample Size:	558	9	88	254

Question: Which of the following attractions did you (or will you) visit while on this trip?

Base: All respondents. 930 responses.

Travel Planning Resources Used Before Arrival

Before arriving in the Billings area, online travel agencies are the most-utilized trip planning resource, used by over one-quarter of visitors surveyed (26.5%).

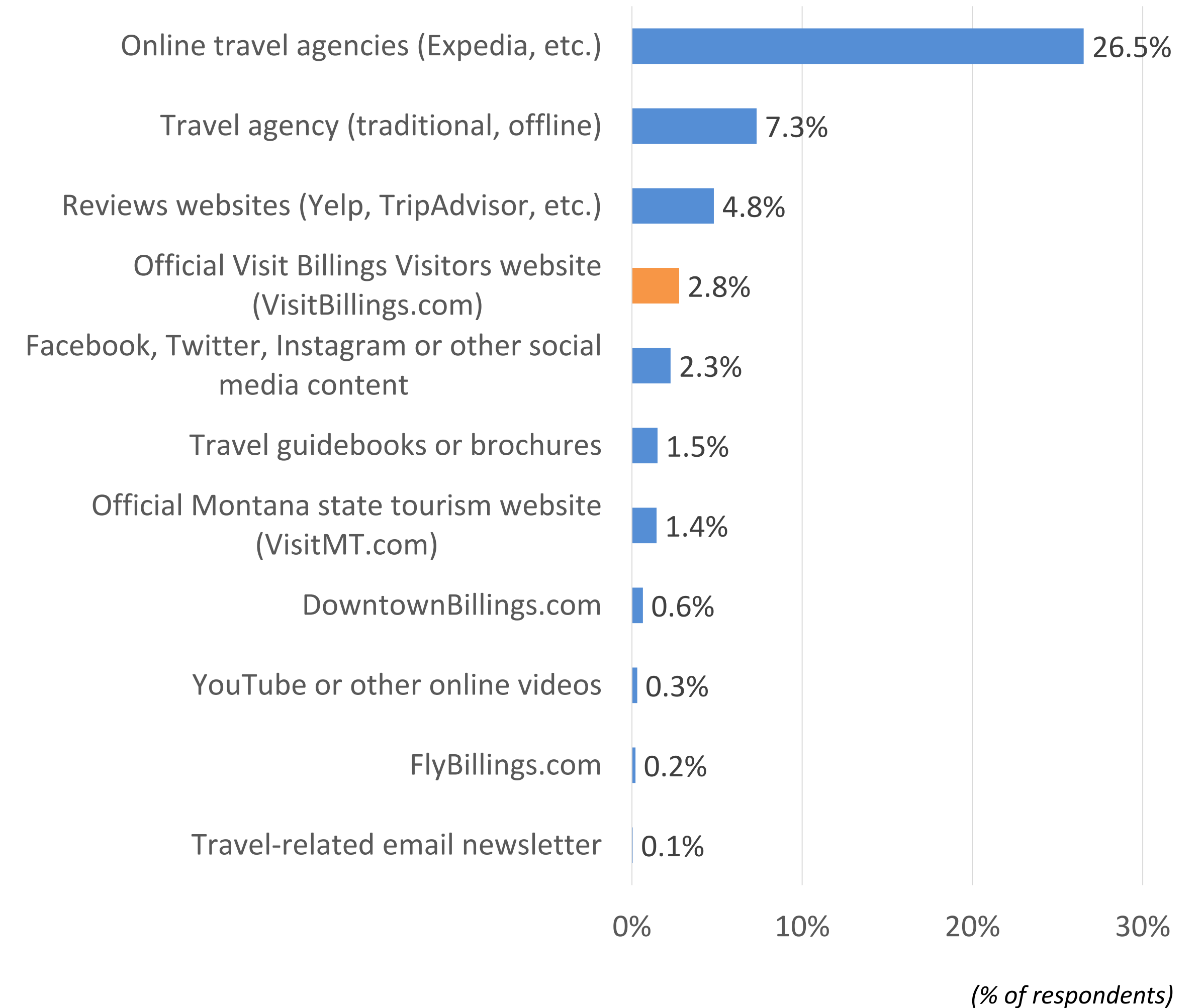
Visitors surveyed were given a list of 11 resources and were asked which of these they used for trip planning before arriving in the destination. After online travel agencies, the next most utilized resources are traditional (offline) travel agencies (7.3%) and reviews websites like Yelp and TripAdvisor (4.8%). Additionally, 2.8 percent reported using the official Billings visitors website, VisitBillings.com, to plan their trip to the area before their arrival.

The list of travel planning resources tested prior to arrival are shown in a table segmented by type of visitor on the next page.

Question: Which of the following resources did you use to plan your Billings trip before arriving and which did you (or will you) use while in the city? (Select all that apply)

Base: All respondents. 930 responses.

Figure 39: Travel Planning Resources Used Before Arrival



Travel Planning Resources Used Before Arrival – Complete Detail

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Online travel agencies (Expedia, etc.)	25.6%	22.2%	23.9%	28.0%
Travel agency (traditional, offline)	6.6%	0.0%	5.7%	8.3%
Reviews websites (Yelp, TripAdvisor, etc.)	10.2%	11.1%	4.5%	2.0%
Official Visit Billings Visitors website (VisitBillings.com)	6.5%	11.1%	1.1%	0.8%
Facebook, Twitter, Instagram or other social media content	3.8%	11.1%	4.5%	1.6%
Travel guidebooks or brochures	3.6%	0.0%	1.1%	0.8%
Official Montana state tourism website (VisitMT.com)	3.0%	11.1%	0.0%	0.4%
DowntownBillings.com	1.3%	0.0%	1.1%	0.4%
YouTube or other online videos	0.7%	0.0%	2.3%	0.0%
FlyBillings.com	0.7%	0.0%	0.0%	0.0%
Travel-related email newsletter	0.2%	0.0%	0.0%	0.0%
Sample Size:	558	9	88	254

Question: Which of the following resources did you use to plan your trip to the Billings area before arriving and which did you (or will you) use while in the area?

Base: All respondents. 930 responses.

Travel Planning Resources Used In-Market

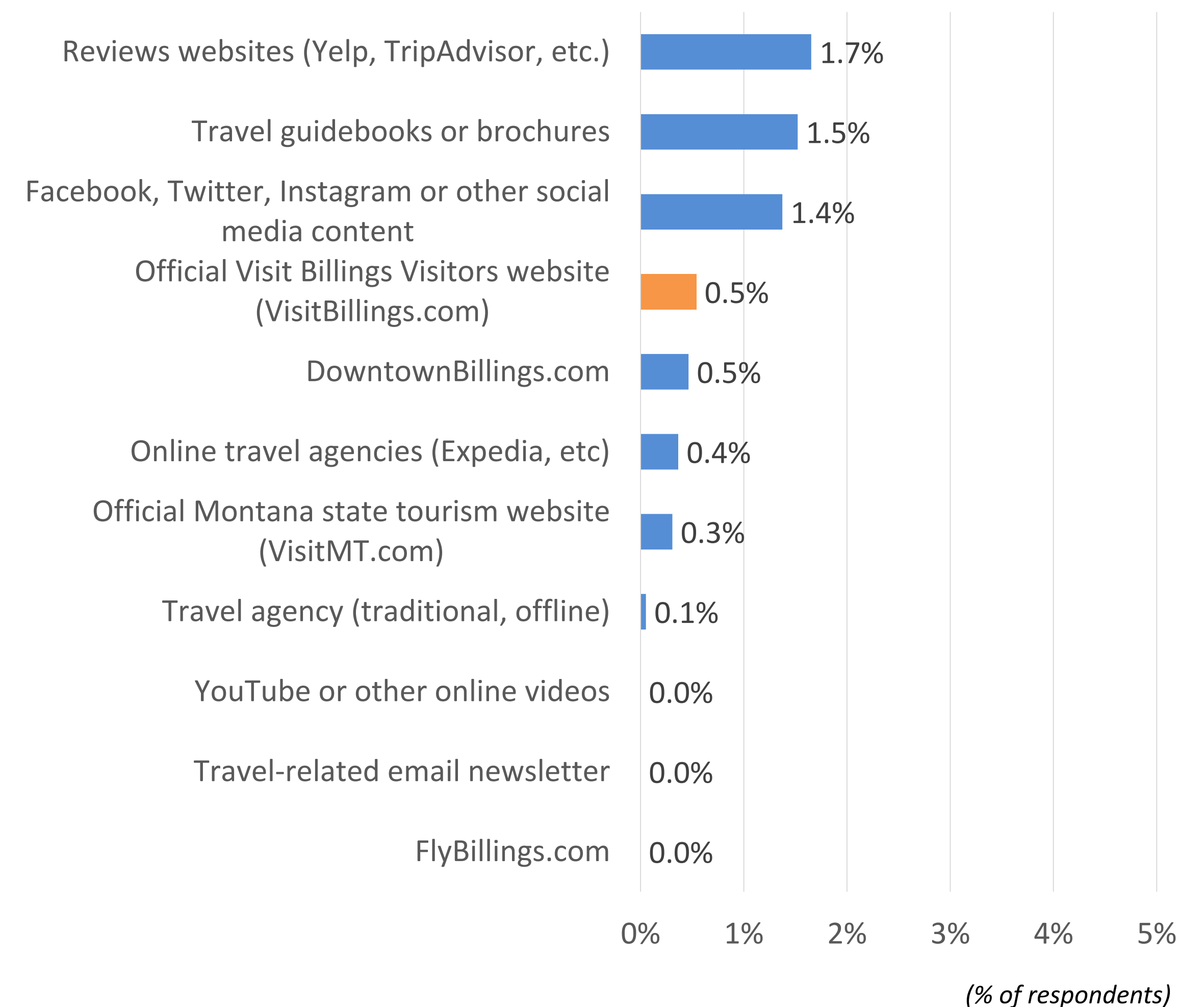
Overall use of trip planning resources typically decreases once visitors are in the destination. Visitors surveyed were given a list of 11 resources and were asked which of these they used for trip planning while in the Billings area. Visitors continued to turn to reviews websites like Yelp and TripAdvisor to plan their trip while in the destination, although to a lesser degree compared to pre-arrival (1.7% vs. 4.8%). Additionally, 0.5 percent of visitors used VisitBillings.com and/or DowntownBillings.com to assist in planning their trip in-market.

The list of travel planning resources tested used in market are shown in a table segmented by type of visitor on the next page

Question: Which of the following resources did you use to plan your trip to the Billings area before arriving and which did you (or will you) use while in the area?

Base: All respondents. 930 responses.

Figure 40: Travel Planning Resources Used In-Market



Travel Planning Resources Used In-Market – Complete Detail

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Reviews websites (Yelp, TripAdvisor, etc.)	3.6%	0.0%	2.3%	0.8%
Travel guidebooks or brochures	3.2%	0.0%	0.0%	0.4%
Facebook, Twitter, Instagram or other social media content	2.7%	0.0%	2.3%	0.8%
Official Visit Billings Visitors website (VisitBillings.com)	1.1%	0.0%	1.1%	0.4%
DowntownBillings.com	0.9%	11.1%	2.3%	0.0%
Online travel agencies (Expedia, etc)	0.9%	0.0%	2.3%	0.0%
Official Montana state tourism website (VisitMT.com)	0.5%	11.1%	1.1%	0.0%
Travel agency (traditional, offline)	0.2%	0.0%	0.0%	0.0%
FlyBillings.com	0.0%	0.0%	0.0%	0.0%
Travel-related email newsletter	0.0%	0.0%	0.0%	0.0%
YouTube or other online videos	0.0%	0.0%	0.0%	0.0%
Sample Size:	558	9	88	254

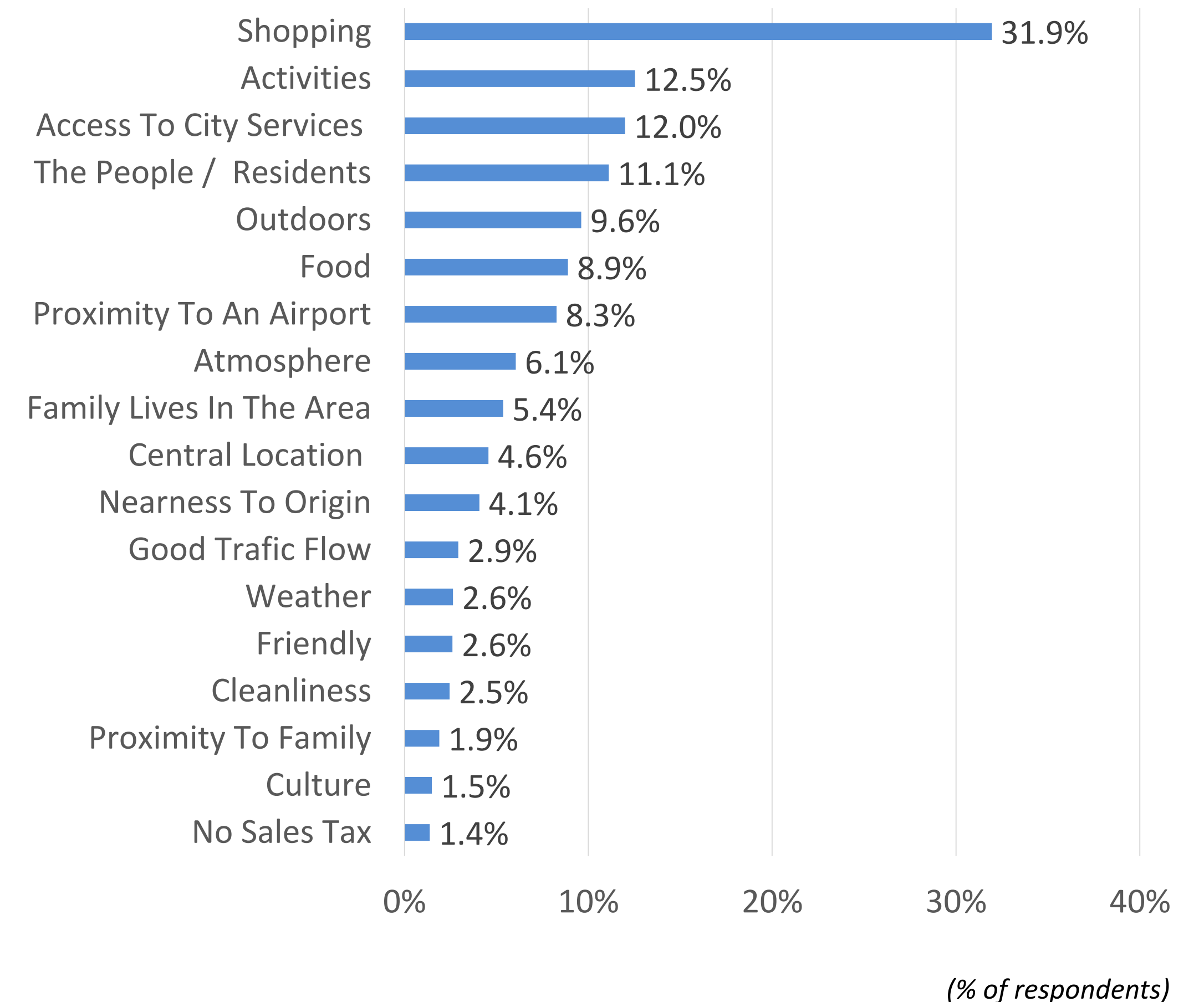
Question: Which of the following resources did you use to plan your trip to the Billings area before arriving and which did you (or will you) use while in the area?

Base: All respondents. 930 responses.

Most Liked Aspects of Billings (Unaided)

Shopping, general activities, access to city services and the people in Billings were the most liked aspects of the destination amongst visitors surveyed. Visitors were asked, in an open-ended format, what they liked best about the Billings area. The chart at right and table on the following page list the top cited responses. In addition to shopping (31.9%) and activities (12.5%), access to city services such as cellular service and medical care (12.0%) and “the people/ residents” (11.1%) were the most commonly named favorite aspects of the area. Additionally, approximately one in ten visitors said the outdoors were what they liked best (9.6%).

Figure 41: Most Liked Aspects of Billings (Unaided)



Question: What do you like most about Billings?

Base: All respondents. 826 responses.

Most Liked Aspects of Billings (Unaided) – Complete Detail

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Shopping	17.4%	25.0%	24.7%	39.9%
Activities	10.0%	0.0%	7.4%	14.5%
Access To City Services (Cell Service, Doctors, Etc.)	3.9%	12.5%	9.9%	16.2%
The People / Residents	19.3%	25.0%	12.3%	7.0%
Outdoors	13.5%	0.0%	7.4%	7.5%
Food	10.7%	12.5%	8.6%	8.8%
Proximity To An Airport	1.6%	0.0%	0.0%	12.3%
Atmosphere	9.8%	12.5%	4.9%	4.4%
Family Lives In The Area	5.5%	12.5%	34.6%	3.1%
Central Location (Geographically)	4.3%	12.5%	2.5%	4.4%
Nearness To Origin	2.9%	0.0%	2.5%	4.8%
Good Traffic Flow	2.3%	0.0%	0.0%	3.5%
Weather	4.5%	0.0%	7.4%	1.8%
Friendly	4.9%	0.0%	1.2%	1.8%
Cleanliness	2.7%	0.0%	1.2%	1.8%
Proximity To Family	0.8%	0.0%	12.3%	1.8%
Culture	2.9%	12.5%	0.0%	0.9%
No Sales Tax	0.8%	0.0%	0.0%	1.8%
Climate	0.6%	0.0%	2.5%	1.3%
Affordability / Good Value	0.4%	0.0%	1.2%	1.3%
History Of Billings	1.2%	0.0%	0.0%	0.9%
Open Feeling	1.6%	0.0%	2.5%	0.4%
Civic Beauty	2.3%	0.0%	1.2%	0.0%
Walkability	1.4%	0.0%	0.0%	0.4%
Romance / Meeting Opposite Sex	0.4%	0.0%	0.0%	0.9%
Downtown Area	1.0%	0.0%	0.0%	0.4%
Has Lived / Still Lives In The Area	0.6%	0.0%	1.2%	0.4%
Bar Scene	1.6%	0.0%	0.0%	0.0%
Access To The University	0.6%	0.0%	0.0%	0.4%
Lodging	1.4%	0.0%	0.0%	0.0%
Change Of Pace	1.2%	0.0%	1.2%	0.0%
Sample Size:	488	8	81	228

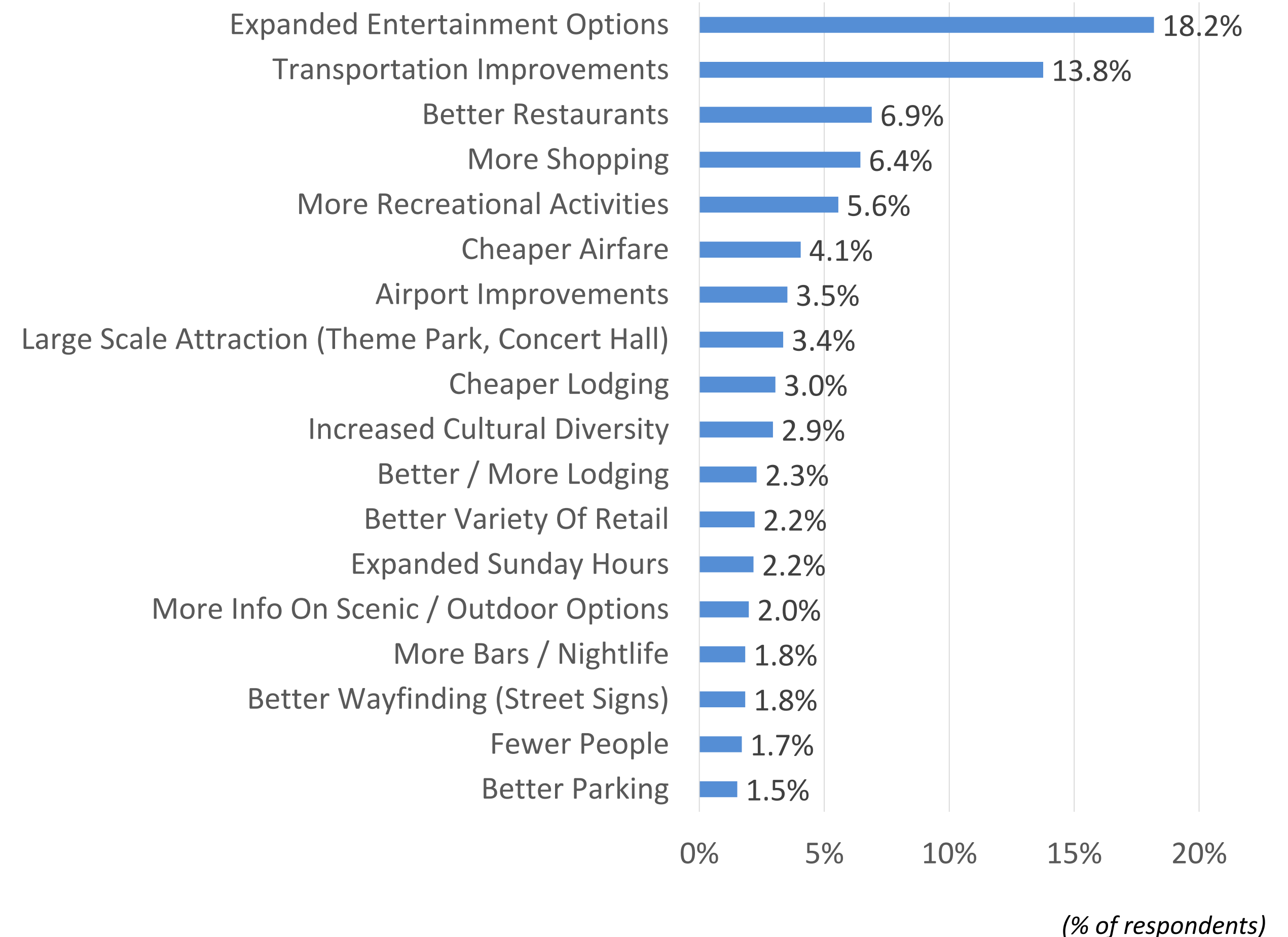
Question: What do you like most about Billings?

Base: All respondents. 826 responses.

Attractions/Services that Would Enhance the Billings Area (Unaided)

When asked what attractions or services would have most enhanced visitors' experience in the Billings area, nearly one in five respondents said they would like expanded entertainment options (18.2%). Other top suggestions were to make improvements to transportation (13.8%) and restaurants (6.9%), and offer more shopping (6.4%) and recreational activities (5.6%). VFR were the most likely to say that improvements to transportation (27.8%) and expanded Sunday hours (16.7%) would enhance the area.

Figure 42: Attractions/Services that Would Enhance Billings Area (Unaided)



Question: What additional attractions or services would enhance the visitor experience in Billings? Base: All respondents. 166 responses.

Attractions/Services That Would Enhance Billings (Unaided) – Complete Detail

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Expanded Entertainment Options	22.5%	50.0%	11.1%	12.2%
Transportation Improvements	19.6%	0.0%	27.8%	9.8%
Better Restaurants	6.9%	0.0%	5.6%	7.3%
More Shopping	4.9%	0.0%	5.6%	7.3%
More Recreational Activities	2.9%	0.0%	5.6%	7.3%
Cheaper Airfare	1.0%	50.0%	5.6%	4.9%
Airport Improvements	1.0%	0.0%	5.6%	4.9%
Large Scale Attraction (Theme Park, Concert Hall)	1.0%	0.0%	0.0%	4.9%
Cheaper Lodging	0.0%	0.0%	0.0%	4.9%
Increased Cultural Diversity	0.0%	0.0%	0.0%	4.9%
Better / More Lodging	2.9%	0.0%	0.0%	2.4%
Better Variety Of Retail	6.9%	0.0%	0.0%	0.0%
Expanded Sunday Hours	3.9%	0.0%	16.7%	0.0%
More Info On Scenic / Outdoor Options	2.0%	0.0%	0.0%	2.4%
Better Wayfinding (Street Signs)	1.0%	0.0%	0.0%	2.4%
More Bars / Nightlife	1.0%	0.0%	0.0%	2.4%
Fewer People	1.0%	0.0%	0.0%	2.4%
Better Parking	0.0%	0.0%	0.0%	2.4%
Sample Size:	102	2	18	41

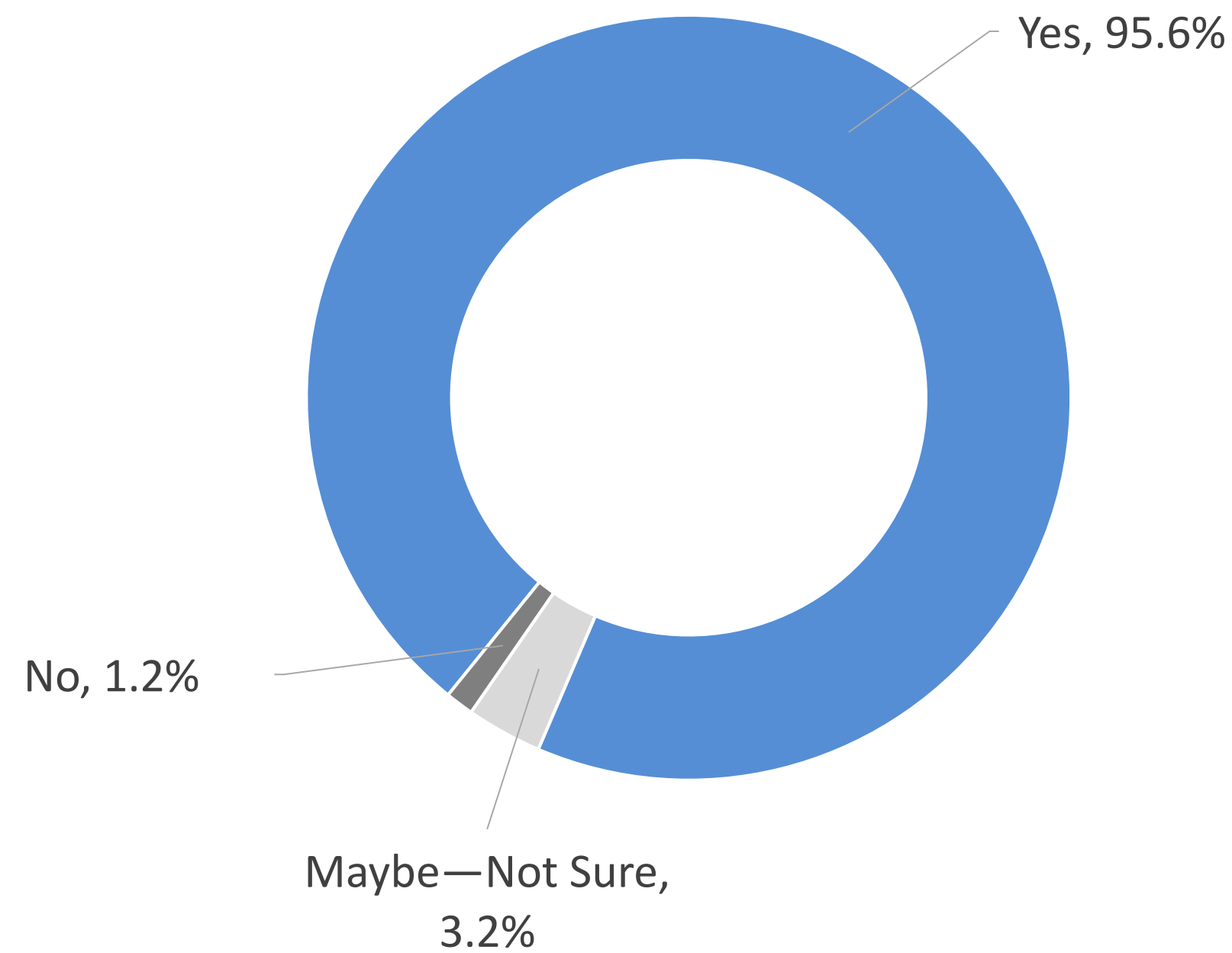
Question: What additional attractions or services would enhance the visitor experience in Billings?

Base: All respondents. 166 responses.

Likelihood to Return to Billings

Visitors reported a high likelihood to return to the Billings area in the future—a strong indicator of satisfaction. In total, 95.6 percent of visitors surveyed said they indeed would return to the Billings area.

Figure 43: Return to Billings



Base: All respondents. 914 responses.

Detail by Type of Visitor

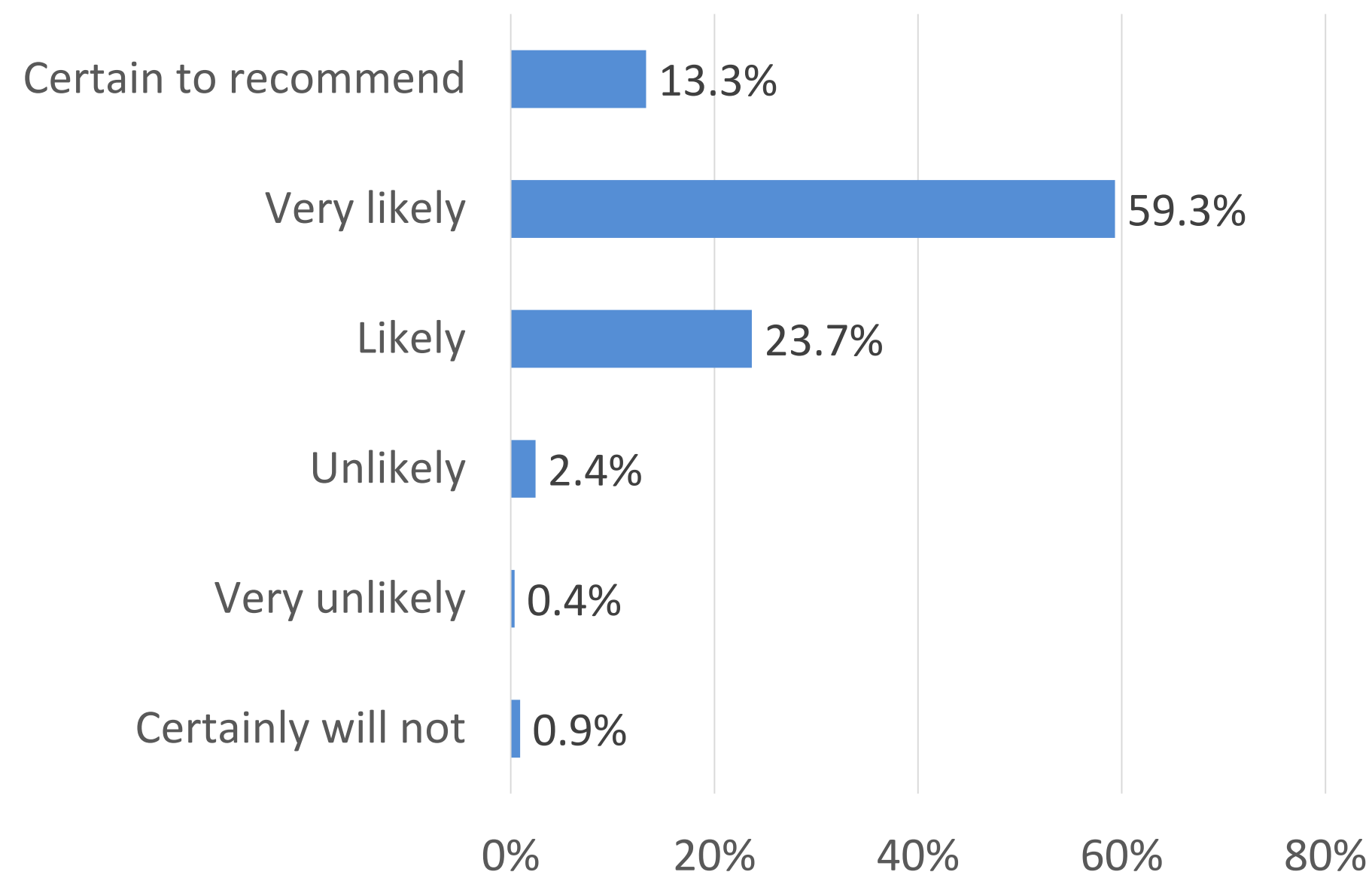
	Hotel	Home Share	VFR	Day Trip
Yes	91.5%	100.0%	95.3%	97.6%
No	1.3%	0.0%	0.0%	1.2%
Sample Size:	552	9	85	247

Question: Would you return to Billings?

Likelihood to Recommend Billings

Nearly all visitors are likely to recommend Billings to other travelers (96.3%). This is based on those who were “likely” (23.7%), “very likely” (59.3%) or “certain” (13.3%) to recommend visiting Billings to fellow travelers.

Figure 44: Likelihood to Recommend Billings



Base: All respondents. 917 responses.

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Certain to recommend	14.9%	11.1%	10.3%	11.6%
Very likely	53.7%	66.7%	50.6%	63.1%
Likely	26.9%	11.1%	33.3%	22.1%
Unlikely	3.3%	0.0%	4.6%	2.0%
Very unlikely	0.9%	11.1%	0.0%	0.0%
Certainly will not	0.4%	0.0%	1.1%	1.2%
Sample Size:	551	9	87	249

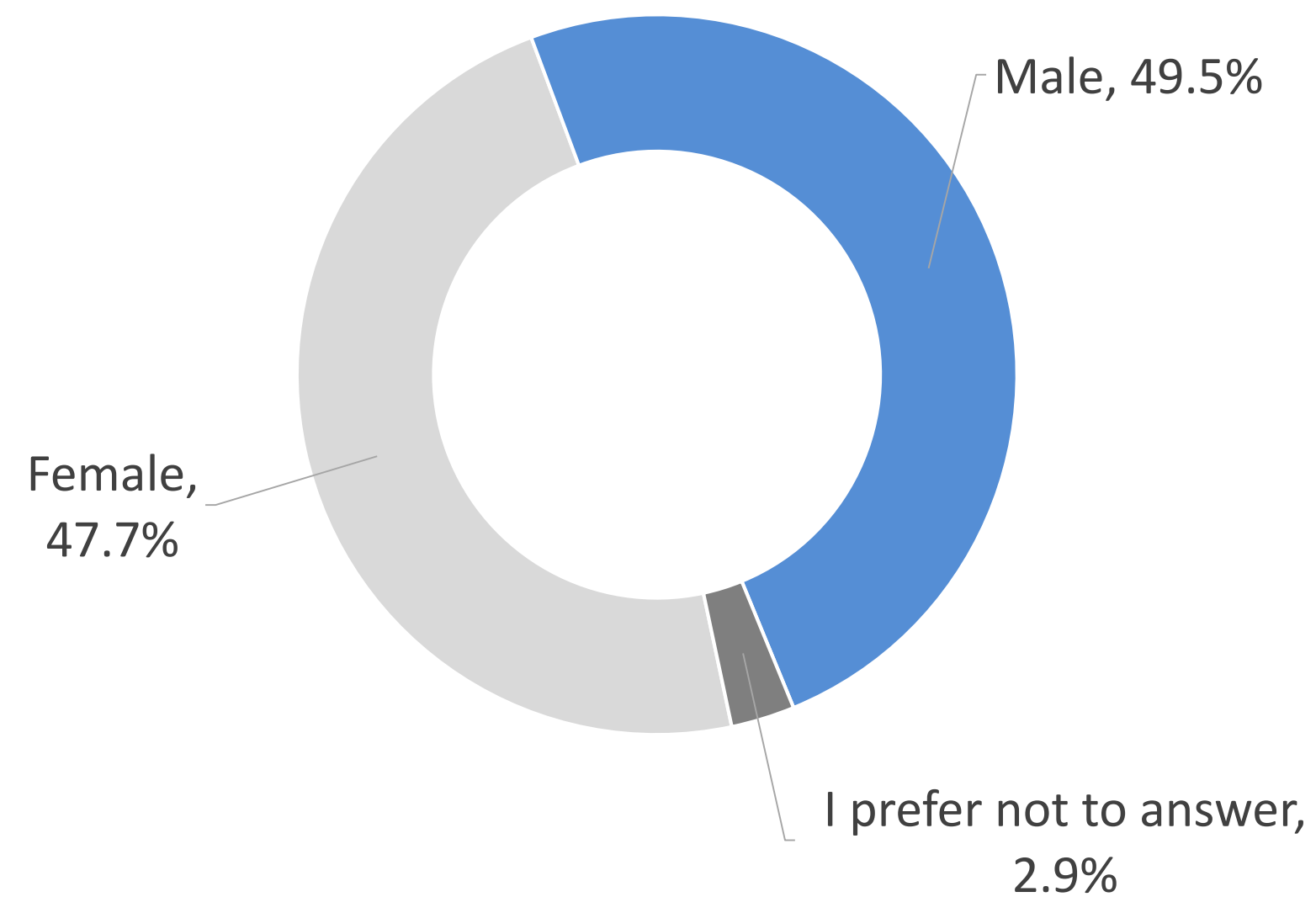
Question: How likely are you to recommend visiting Billings to travelers like yourself?

RESPONDENT DEMOGRAPHICS

Gender

Surveyed visitors skewed slightly male. In total, 49.5 percent were male and 47.7 percent were female.

Figure 45: Gender



Base: All respondents. 913 responses.

Detail by Type of Visitor

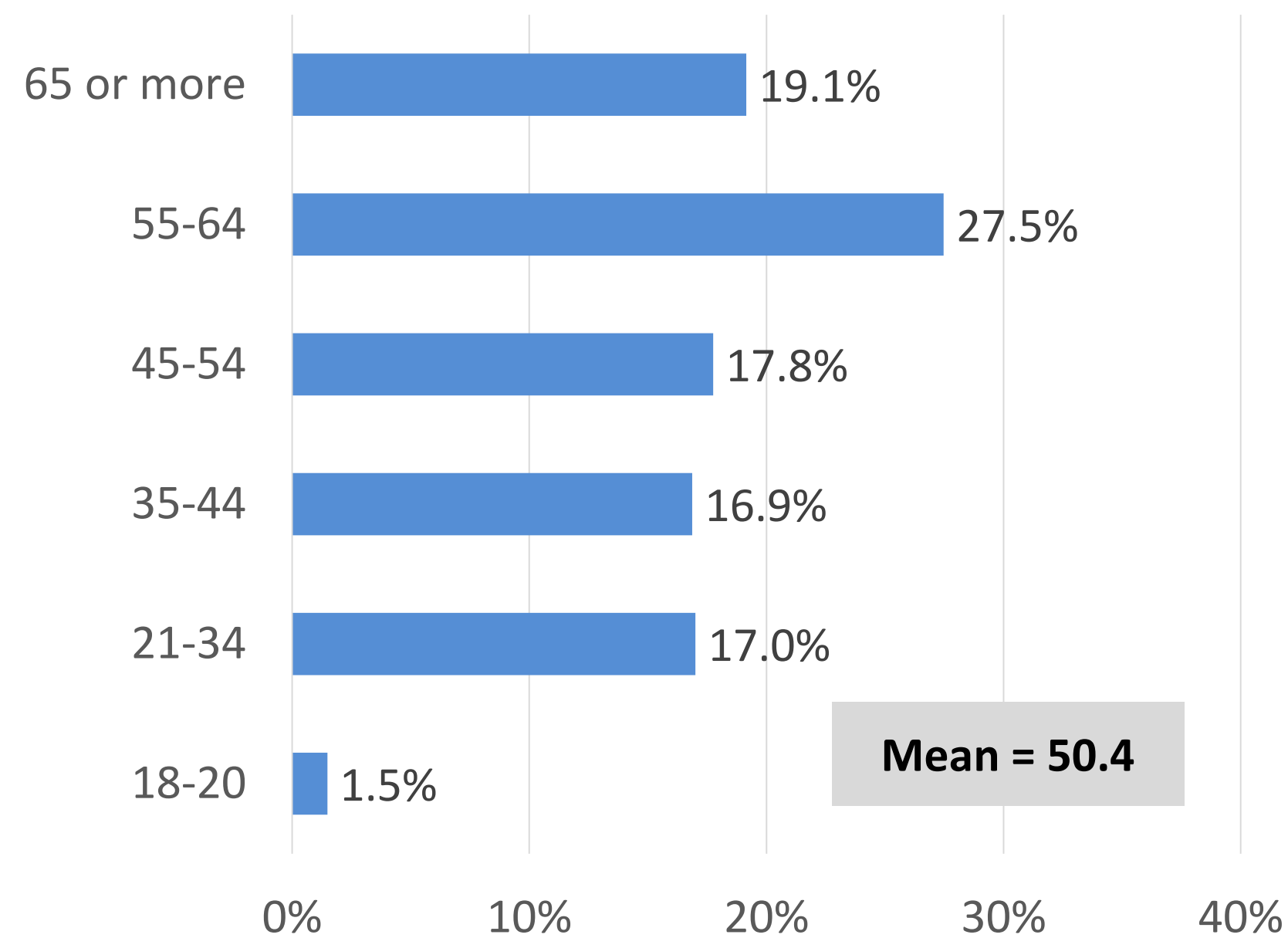
	Hotel	Home Share	VFR	Day Trip
Female	46.5%	66.7%	58.6%	47.0%
Male	51.3%	33.3%	37.9%	49.8%
I prefer not to answer	2.2%	0.0%	3.4%	3.2%
Sample Size:	546	9	87	251

Question: What is your gender?

Age

The average age of Billings area visitors surveyed was 50.4 years. On average, Home Share guests were comparatively the youngest (45.4) while day trippers were the oldest (51.9).

Figure 46: Age



Base: All respondents. 868 responses.

Detail by Type of Visitor

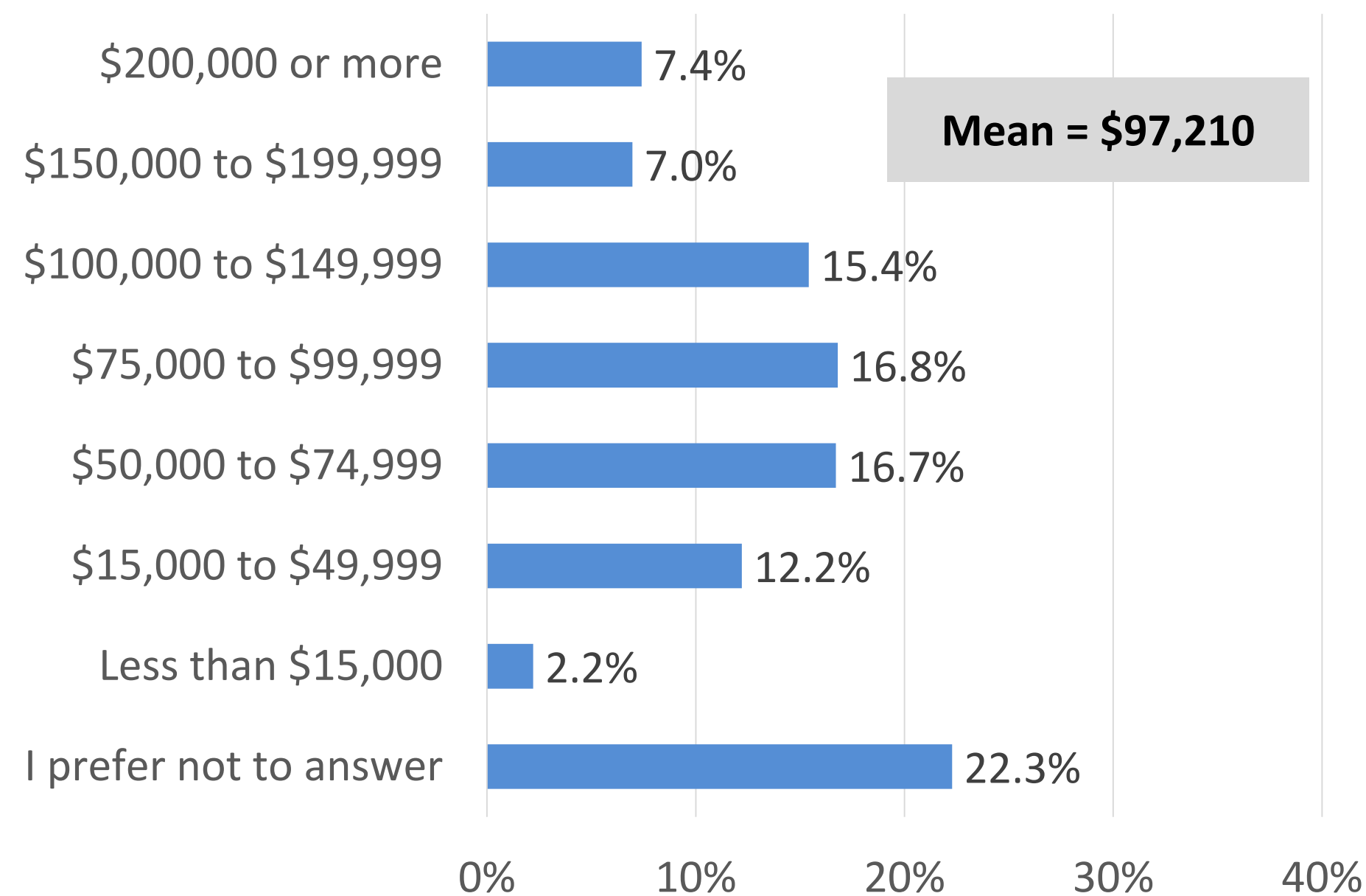
	Hotel	Home Share	VFR	Day Trip
65 or more	14.0%	11.1%	24.4%	21.4%
55-64	22.9%	22.2%	17.1%	29.8%
45-54	22.3%	22.2%	13.4%	16.0%
35-44	18.3%	22.2%	9.8%	17.2%
21-34	21.7%	11.1%	28.0%	13.9%
18-20	0.6%	0.0%	4.9%	1.7%
Mean:	47.9	45.4	46.8	51.9
Sample Size:	520	9	82	238

Question: In what year were you born?

Annual Household Income

The average annual household income of Billings area visitors is **\$97,210**. Hotel Guests and Home Share guests reported income higher than the other visitor segments (\$107,983 and \$107,142, respectively).

Figure 47: Annual Household Income



Base: All respondents. 903 responses.

Detail by Type of Visitor

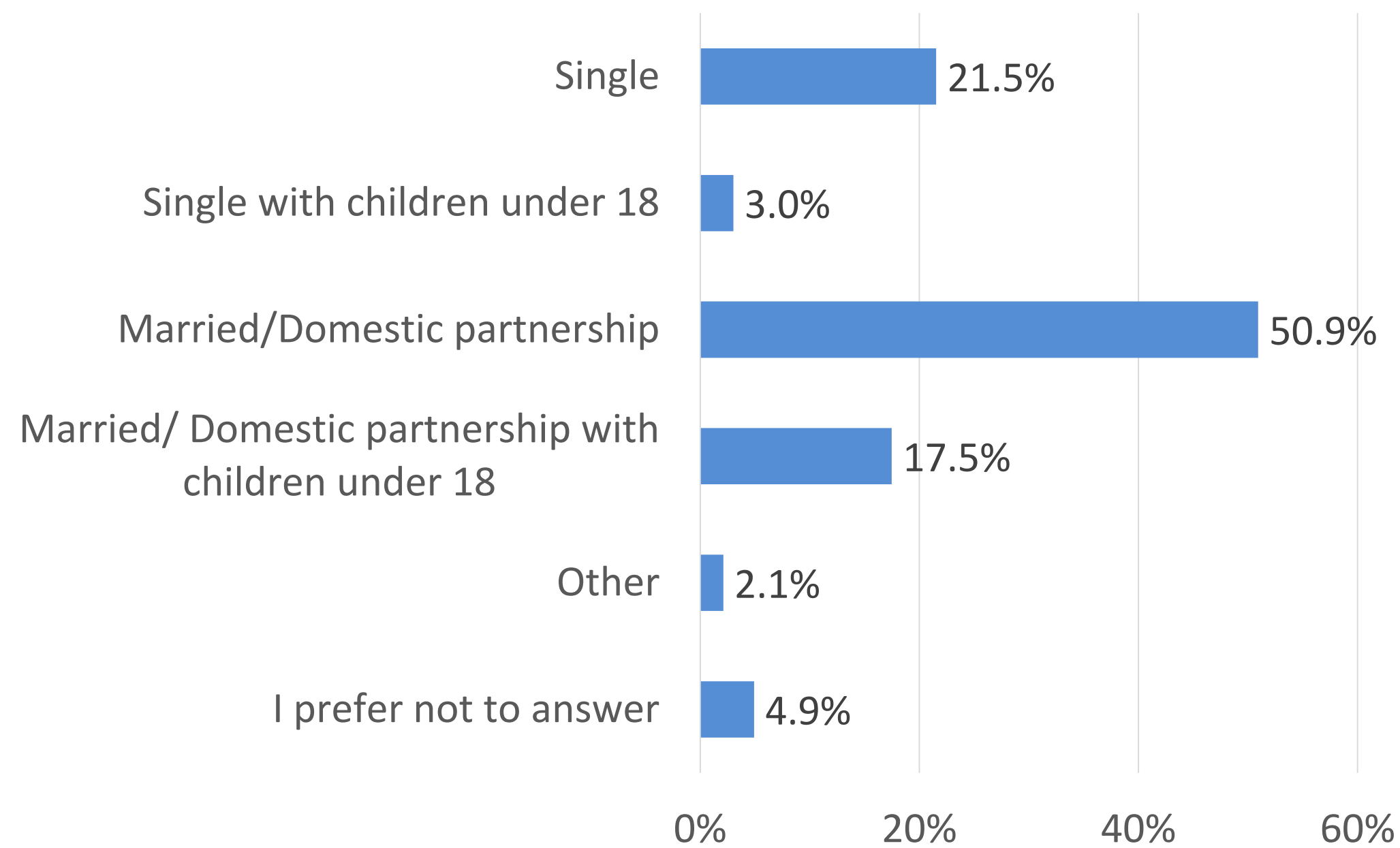
	Hotel	Home Share	VFR	Day Trip
\$200,000 or more	11.5%	0.0%	7.1%	6.0%
\$150,000 to \$199,999	7.8%	11.1%	6.0%	6.8%
\$100,000 to \$149,999	19.8%	22.2%	16.7%	13.3%
\$75,000 to \$99,999	18.5%	33.3%	14.3%	15.7%
\$50,000 to \$74,999	14.8%	11.1%	10.7%	18.5%
\$15,000 to \$49,999	9.4%	0.0%	15.5%	12.9%
Less than \$15,000	1.5%	0.0%	3.6%	2.4%
I prefer not to answer	16.8%	22.2%	26.2%	24.5%
Mean	\$107,983	\$107,142	\$94,879	\$92,938
Sample Size:	541	9	84	249

Question: Which of the following best describes the combined annual income of all members of your household?

Marital Status

Two-thirds of Billings area visitors were married (68.4%), while one-quarter were single (24.5%). In total, 20.5 percent of survey respondents had children under the age of 18.

Figure 48: Marital Status



Base: All respondents. 916 responses.

Detail by Type of Visitor

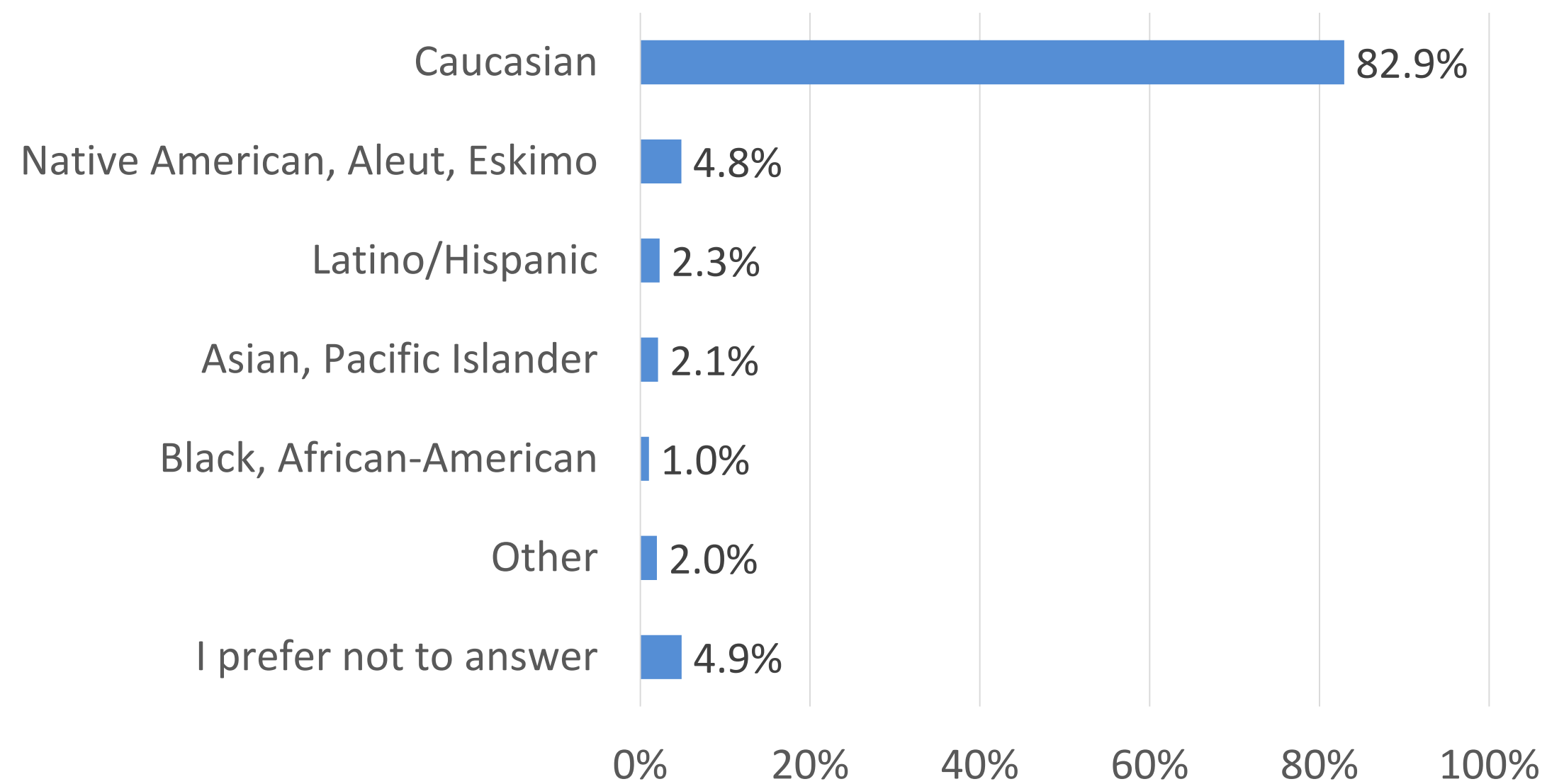
	Hotel	Home Share	VFR	Day Trip
Single	24.4%	11.1%	32.2%	19.2%
Single with children under 18	3.6%	0.0%	4.6%	2.4%
Married/Domestic partnership	45.5%	44.4%	37.9%	54.4%
Married/ Domestic partnership with children under 18	21.1%	33.3%	16.1%	16.4%
Other	1.5%	11.1%	1.1%	2.4%
I prefer not to answer	3.8%	0.0%	8.0%	5.2%
Sample Size:	541	9	84	249

Question: Which of the following best describes your current marital status?

Ethnicity

In total, 82.9 percent of Billings area visitors surveyed identified as Caucasian, while 12.2 percent identified as a non-Caucasian ethnicity. The largest non-Caucasian visitor groups were Native American, Aleut, Eskimo (4.8%), Latino/Hispanic (2.3%) and Asian, Pacific Islander (2.1%).

Figure 49: Ethnicity



Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Caucasian	83.5%	77.8%	85.1%	82.2%
Native American, Aleut, Eskimo	4.2%	11.1%	4.6%	5.1%
Latino/Hispanic	3.5%	11.1%	2.3%	1.6%
Asian, Pacific Islander	2.0%	0.0%	1.1%	2.4%
Black, African-American	1.8%	0.0%	0.0%	0.8%
Other	1.3%	0.0%	2.3%	2.4%
I prefer not to answer	3.8%	0.0%	4.6%	5.5%
Sample Size:	550	9	87	253

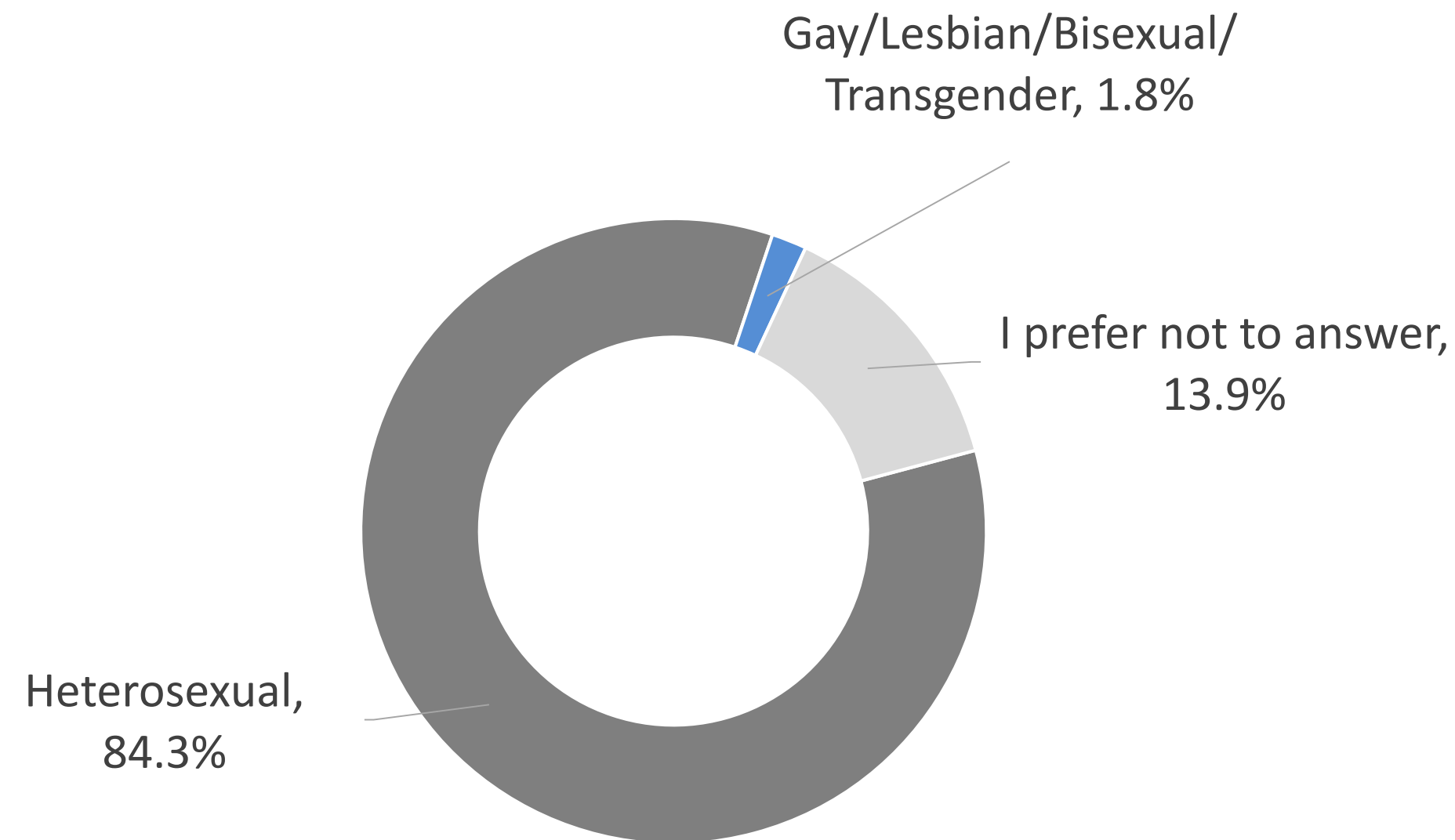
Base: All respondents. 919 responses.

Question: Which best describes your ethnicity?

Orientation

1.8 percent of visitors surveyed identified as LGBTQ.

Figure 50: Orientation



Base: All respondents. 855 responses.

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Heterosexual	88.9%	88.9%	83.7%	82.5%
Gay/Lesbian/Bisexual/Transgender	1.4%	0.0%	2.3%	2.0%
I prefer not to answer	9.6%	11.1%	14.0%	15.5%
Sample Size:	488	9	86	252

Question: Which best describes you? (Select one)

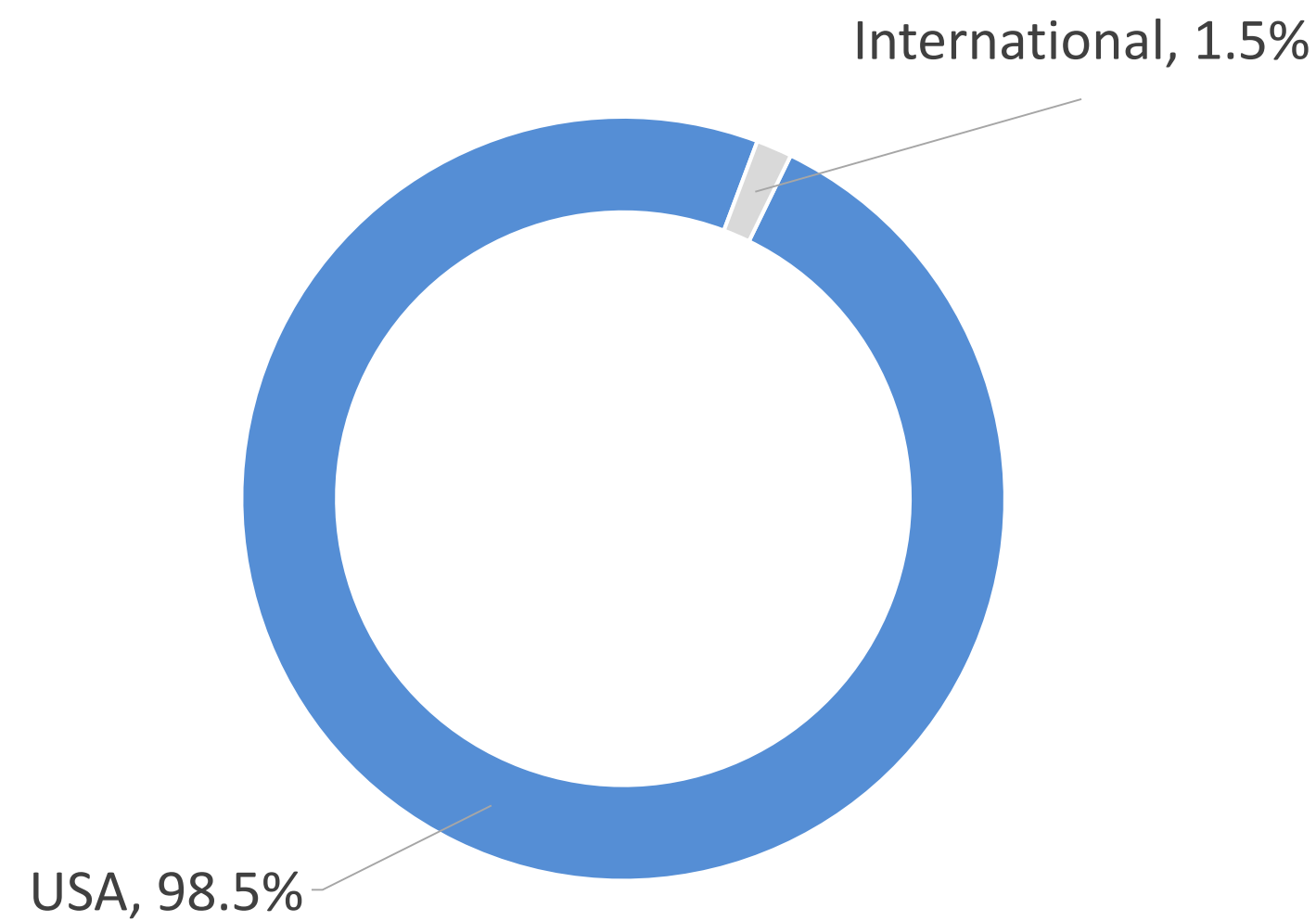
POINT OF ORIGIN

Point of Origin: Country of Residence

In total, 97.9 percent of visitors surveyed were U.S. residents, and 2.1 percent were international visitors. The top international market represented in the sample was Canada (0.7 %).

Important Note: The survey was only available in English.

Figure 51: Domestic vs. International Visitors



Base: All respondents. 928 responses.

Detail by Type of Visitor – Country of Residence

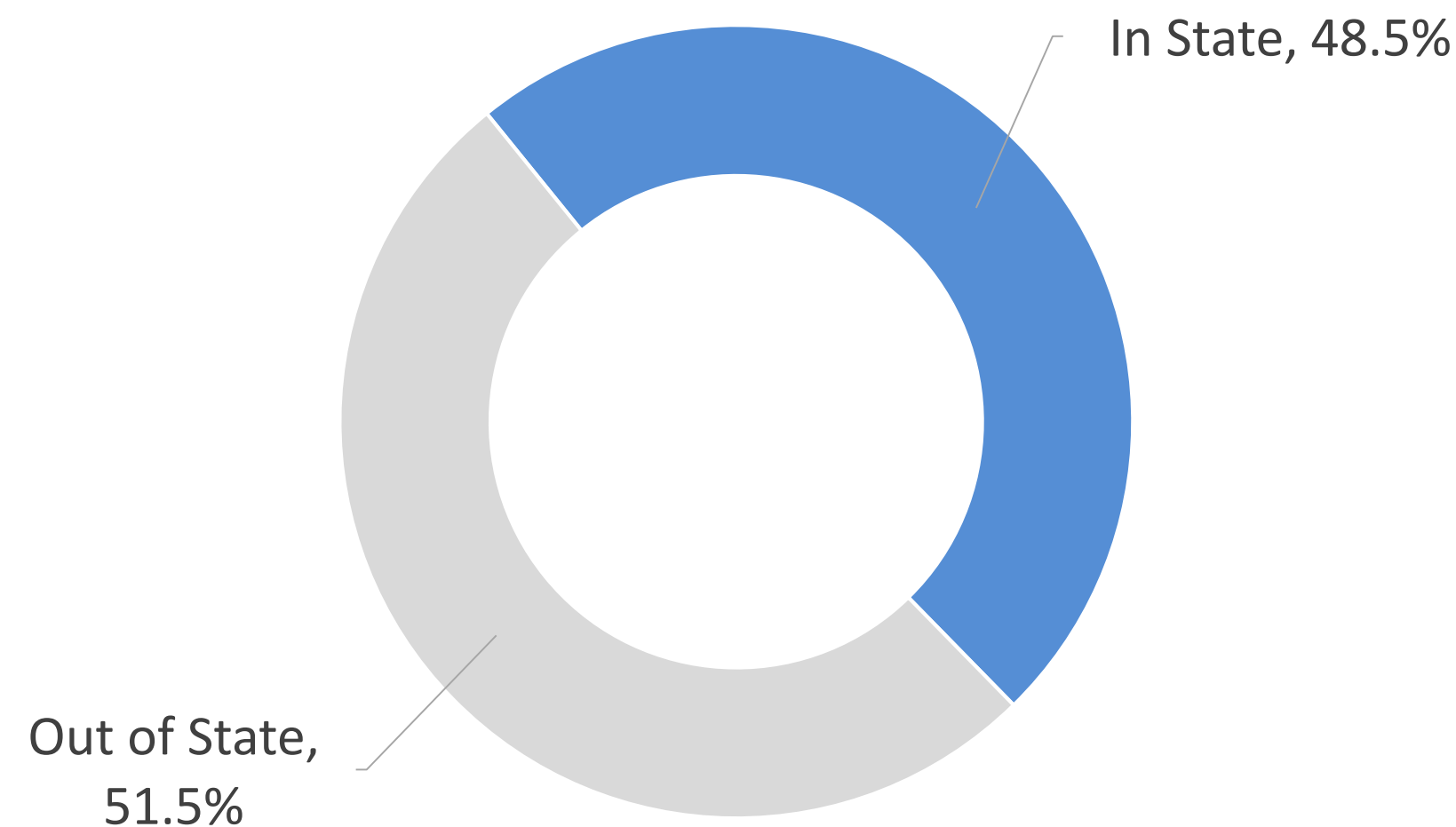
	Total	Hotel	Home Share	VFR	Day Trip
USA	98.5%	96.9%	100.0%	98.9%	99.2%
Canada	0.7%	1.4%	0.0%	0.0%	0.4%
Germany	0.2%	0.0%	0.0%	0.0%	0.4%
United Kingdom	0.1%	0.4%	0.0%	0.0%	0.0%
Other countries	0.4%	1.3%	0.0%	1.1%	0.0%
Sample Size:	925	556	9	88	251

Question: In what country do you reside?

Point of Origin: Top States of Residence

Just under one-half of domestic Billings area visitors surveyed were Montana residents (48.5%). In total, 51.5 percent of domestic visitors were out-of-state residents, with the highest visitation from residents of Wyoming (12.0%), California (3.6%) and Colorado (3.4%). The highest proportion of out-of-state visitors who stayed overnight in a Billings area hotel were from California (6.6%), Wyoming (6.1%), Washington (4.7%), Colorado (4.2%) and North Dakota (4.0%).

Figure 52: In-State vs. Out-of-State Visitors



Detail by Type of Visitor

	Total	Hotel	Home Share	VFR	Day Trip
Montana	48.5%	31.1%	44.4%	55.3%	56.6%
Wyoming	12.0%	6.1%	0.0%	4.7%	15.6%
California	3.6%	6.6%	11.1%	4.7%	2.0%
Colorado	3.4%	4.2%	0.0%	3.5%	3.3%
Washington	2.5%	4.7%	0.0%	3.5%	1.6%
North Dakota	2.4%	4.0%	0.0%	1.2%	2.0%
Texas	2.4%	3.4%	0.0%	2.4%	2.0%
Arizona	2.1%	2.5%	0.0%	1.2%	2.0%
Minnesota	1.9%	2.1%	11.1%	3.5%	1.6%
Oregon	1.5%	1.9%	11.1%	1.2%	1.2%
Missouri	1.2%	2.1%	0.0%	1.2%	0.8%
New York	1.1%	1.5%	0.0%	0.0%	0.8%
Sample Size:	885	527	9	85	244

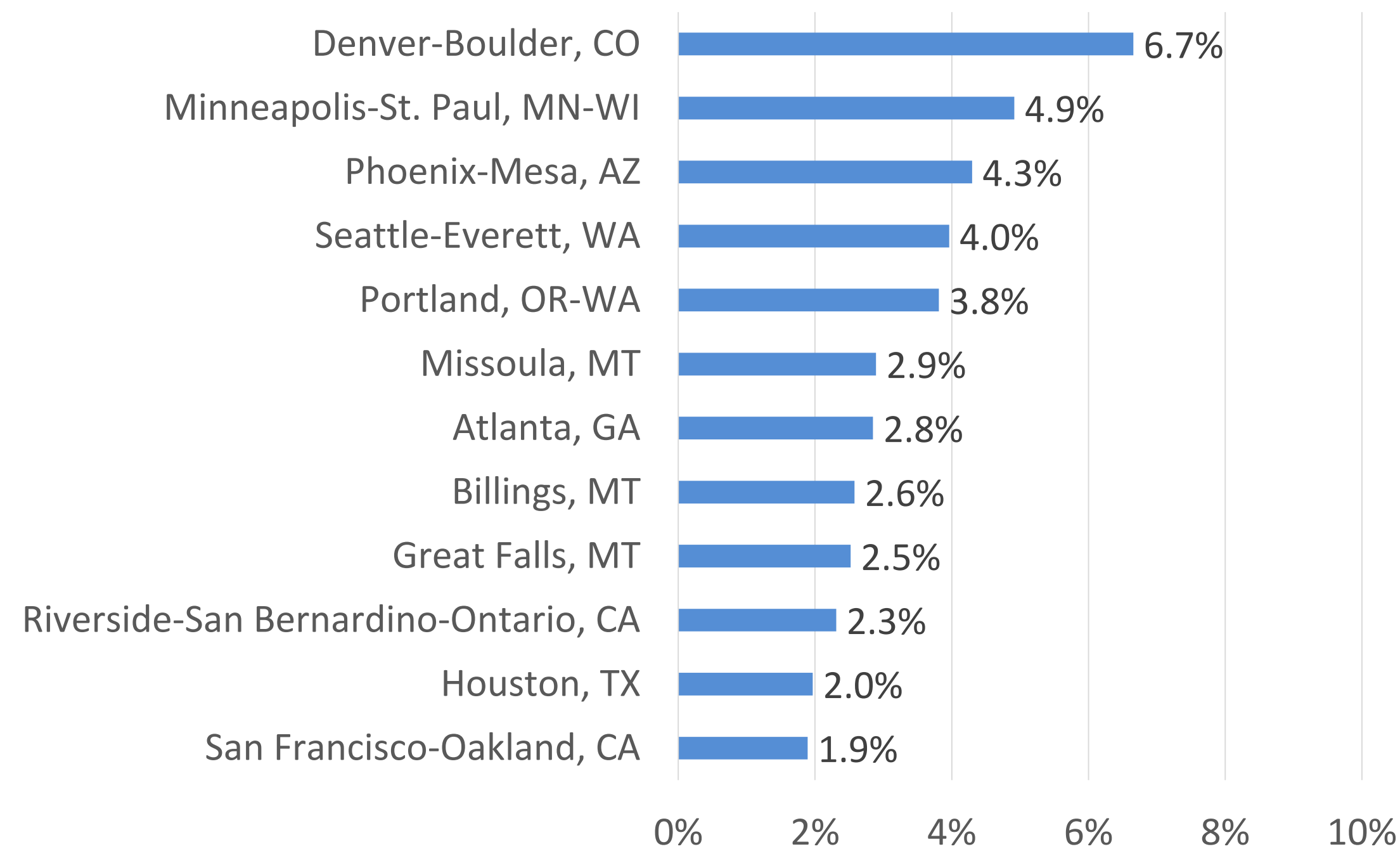
Base: Respondents who live in the United States. 885 responses.

Question: What is your zip/postal code?

Point of Origin: Top MSAs of Residence

The top visitor markets represented in the survey sample were Denver-Boulder (6.7%) and Minneapolis-St. Paul, MN-WI (4.9%). These were followed by Phoenix-Mesa, AZ (4.3%), Seattle-Everett, WA (4.0%) and Portland, OR-WA (3.8%).

Figure 53: Point of Origin - Top MSAs of Residence



Base: Respondents who live in the United States. 391 responses.

Detail by Type of Visitor

	Hotel	Home Share	VFR	Day Trip
Denver-Boulder, CO	6.5%	0.0%	2.6%	8.1%
Minneapolis-St. Paul, MN-WI	3.2%	0.0%	7.9%	6.5%
Phoenix-Mesa, AZ	2.9%	0.0%	0.0%	6.5%
Seattle-Everett, WA	2.5%	0.0%	2.6%	6.5%
Portland, OR-WA	2.2%	25.0%	5.3%	4.8%
Missoula, MT	4.3%	0.0%	15.8%	0.0%
Atlanta, GA	1.8%	0.0%	0.0%	4.8%
Billings, MT	0.4%	0.0%	2.6%	4.8%
Great Falls, MT	3.2%	0.0%	5.3%	1.6%
Riverside-San Bernardino, CA	2.9%	0.0%	5.3%	1.6%
Houston, TX	0.7%	0.0%	2.6%	3.2%
San Francisco-Oakland, CA	2.5%	0.0%	0.0%	1.6%
Sample Size:	278	4	38	62

Question: What is your zip/postal code?