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2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

Kara Grau, M.S.

10/12/2017

Nonresident travelers spend over \$3 billion in Montana each year. This report looks at how the money spent is distributed across the six Montana travel regions, as well as 16 of the 56 counties in the state which receive the highest spending.

**2015 Economic Contribution of Nonresident
Travel Spending in Montana Regions and Counties**
Revised

Prepared by

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2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2017

Abstract

Money spent by those traveling in Montana has an effect directly on the businesses where spending occurs, and it ripples throughout the state's economy from there. Statewide, spending by nonresidents (averaged over two years) totaled \$3.57 billion. This report details the methods and results of the economic impact analyses for each of Montana's travel regions, as well as analyses for counties in which nonresident travelers spent approximately \$50 million or more.

Executive summary

Nonresident travelers spent \$3.57 billion throughout Montana during 2015 (estimate is an average of 2014 and 2015 nonresident spending). This was a decrease (-5.9%) from the previous year's spending estimate of \$3.79 billion (2013-2014 average).

- Glacier and Yellowstone travel regions received the highest percentage of nonresident spending, 33 and 27 percent, respectively.
- Of the 56 counties in Montana, Gallatin (\$665 million) and Flathead (\$599 million) Counties had the highest amount of spending.
- Sixteen counties had high enough nonresident traveler spending (\$50 million or greater) to allow for an economic impact analysis, the results of which are presented in the report.

2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties **2017**

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2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties 2017

Introduction

Nonresident spending is a significant contributor to Montana’s economy. Money spent by those traveling to and through the state has an effect not only on the businesses where spending occurs, but it ripples throughout Montana’s economy, both locally and regionally. Economic impact analysis allows us to observe the direct and indirect effects of the money spent by nonresident travelers in terms of the economic activity supported by this spending, and the number of jobs and labor income attributable to this spending, as well. This report is comprised of a collection of economic impact analyses for each of Montana’s six travel regions, as well as 16 of the 56 counties in the state.

Methods

Expenditure Data

Nonresident spending data is collected at the statewide level, and estimates are based on average daily spending of visitor groups and the estimated number of visitor groups to Montana each year. To estimate the total spending at the county and region level, the reported spending patterns within each expenditure category are observed for each county in the state, and the state total spending amount is allocated to the counties appropriately.

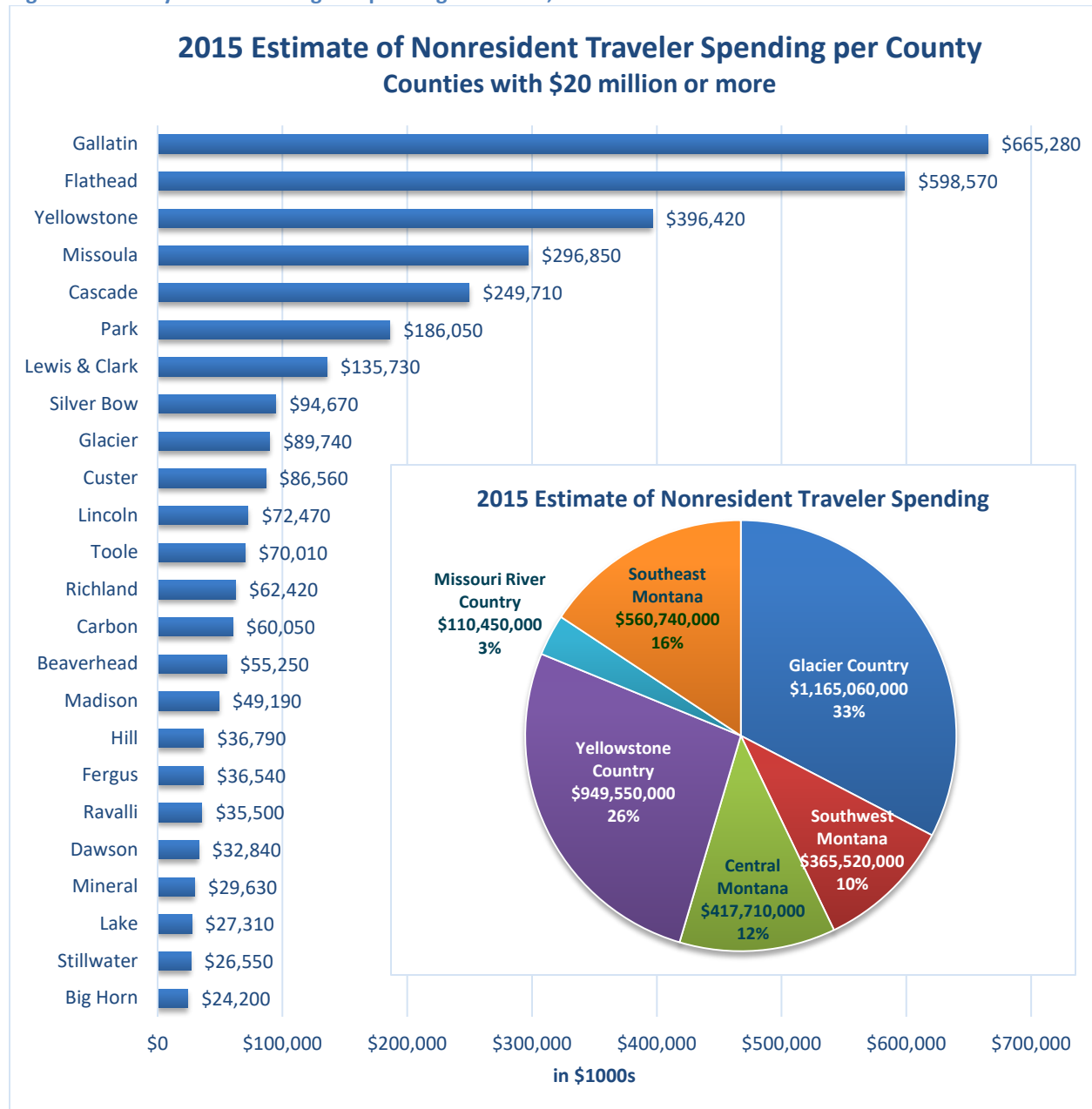
Table 1 - 2014-2015 Average Nonresident Spending per Expenditure Category

Expenditure Category	2015 Total Nonresident Spending (2015 \$s)
Gasoline, Diesel	\$983,770,000
Restaurant, Bar	\$679,470,000
Retail sales	\$506,160,000
Hotel, Motel	\$396,370,000
Groceries, Snacks	\$325,350,000
Outfitter, Guide	\$269,870,000
Licenses, Entrance Fees	\$113,090,000
Auto Rental	\$87,630,000
Rental cabin, Condo	\$64,820,000
Vehicle Repairs	\$32,430,000
Campground, RV Park	\$29,850,000
Made in Montana	\$27,390,000
Misc. Services	\$26,250,000
Gambling	\$17,900,000
Farmers Market	\$4,570,000
Transp. Fares	\$4,110,000
TOTAL	\$3,569,030,000

2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties 2017

The statewide total 2015 average spending is presented in Table 1. For the analyses highlighted in this report, the 2014 (inflation adjusted to 2015 \$) and 2015 county spending estimates were averaged. Doing so helps to account for small sample sizes within some counties and within some spending categories, and the variations in county spending patterns that may occur from year to year because of these small sample sizes. Figure 1 displays total spending in the counties which received an estimated \$20 million or more in nonresident traveler spending. Total spending in the six travel regions is also included.

Figure 1 - County and Travel Region Spending Estimates, 2014-2015



2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2017

Presented in the following figures are the estimates of spending within the various expenditure categories by nonresidents for each of the selected counties (those in which nonresidents spent approximately \$50 million or more) and travel regions. IMPLAN economic modeling software was used to estimate the economic impact of nonresident spending within each of the six travel regions. Additionally, estimates were produced for 16 of Montana's counties which had samples large enough to do so. To clarify, "nonresident spending" indicates money spent by travelers who do not have a permanent residence within Montana. It does not include Montana residents traveling within the state who may have spent money in a county other than the one in which they reside.

IMPLAN Analysis

An IMPLAN model was created for each of the 16 counties and six travel regions. Industry sectors corresponding to the expenditure categories were used in the models, and the dollar amounts for each county and region were input into the respective models accordingly.

The following 22 figures represent summaries for the individual counties and regions. Included in each summary is the estimated two-year average spending within each category and the economic impact within the county or region of that spending. The direct, indirect, induced and combined effects are included to provide a clear illustration of the ripple effect of nonresident spending at the local or regional scale.

In some cases, the economic impact to industry output (the value of goods and service produced by an industry which nonresidents purchase) is a smaller sum than the total amount of spending in a county or region. This is to be expected. On a regional basis, and particularly at the county level, much of the money spent in the area "leaks out." Generally, fewer industries exist at the local level than at the state level. Therefore, many supplies and goods must be purchased outside the local area, and can be considered imports. Hence, the dollar amount spent will not equal the Direct Industry Output figure unless everything required to produce the goods and services purchased by nonresident travelers is available within the region. This is particularly noticeable when looking at county level economic impacts, in which case much of the money spent within a county is leakage, and does not contribute to the impact.

Regions & Counties Included

The following regions are included in this report: Central Montana, Glacier Country, Missouri River Country, Southeast Montana, Southwest Montana, and Yellowstone Country.

The following counties are included: Beaverhead, Carbon, Cascade, Custer, Flathead, Gallatin, Glacier, Lewis and Clark, Lincoln, Madison, Missoula, Park, Richland, Silver Bow, Toole and Yellowstone. Other counties totaled less than \$50 million in nonresident spending, and were, therefore, not analyzed.

2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2017

Conclusions & Recommendations

The reader must be aware that the estimates presented on the following pages are just that – estimates of nonresident traveler spending. It is not possible to collect actual figures of total spending by nonresidents throughout the year at each establishment, or within each industry, in the state. Therefore, estimates of spending are generated by ITRR based on both primary and secondary data. Survey data collected around the state, throughout the year provide insight into average spending patterns and dollar amounts by travel groups. This data, combined with estimates of total visitation to the state, allow for the statewide, region, and county spending estimates to be produced. Sample sizes can vary from year to year within regions, as can the spending patterns of those respondents captured in the sample. This can result in significant variation year-to-year, and readers are urged to use caution when comparing the estimates in this report to any previous or forthcoming estimates of nonresident traveler spending.

Montana Travel Regions – 2015 Nonresident Economic Impacts

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2015 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Central Montana Travel Region



2015 Nonresident Expenditure Percentages in Central Montana Travel Region

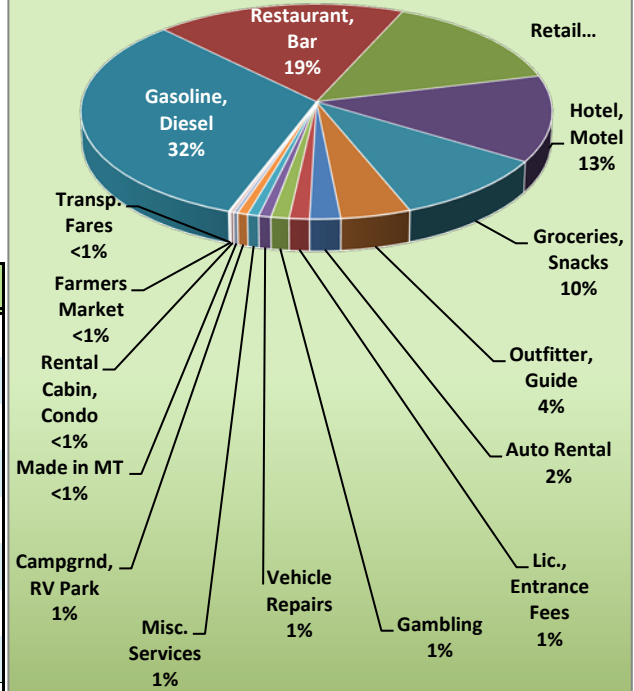


Table 1 - Total Nonresident Spending in Central Montana*⁰

Gasoline, Diesel	\$134,737,000	Gambling	\$4,769,000
Restaurant, Bar	\$78,070,000	Vehicle Repairs	\$3,200,000
Retail Sales	\$60,686,000	Misc. Services	\$2,986,000
Hotel, Motel	\$54,124,000	Campground, RV Park	\$2,670,000
Groceries, Snacks	\$42,104,000	Made in MT	\$1,162,000
Outfitter, Guide	\$18,488,000	Rental Cabin, Condo	\$793,000
Auto Rental	\$8,077,000	Farmers Market	\$289,000
Lic., Entrance Fees	\$5,291,000	Transportation Fares	\$263,000
TOTAL		\$417,709,000	

2015 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

- 2015 average spending* in Central Montana by nonresident visitors to Montana totaled \$417.7 million.
- This \$417.7 million in local spending directly supports \$354.0 million of economic activity in the region, and supports an additional \$188.3 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$542.3 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$353,997,000	\$105,455,000	\$82,821,000	\$542,273,000
Employment (# of jobs)	5,580	840	700	7,120
Employee Compensation	\$80,025,000	\$22,818,000	\$21,777,000	\$124,620,000
Proprietor Income	\$19,595,000	\$6,618,000	\$4,213,000	\$30,426,000
Other Property Type Income	\$35,894,000	\$13,143,000	\$13,585,000	\$62,622,000
State & Local Taxes [^]	—	—	—	\$21,656,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. [^] Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Glacier Country Travel Region

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Glacier Country Travel Region

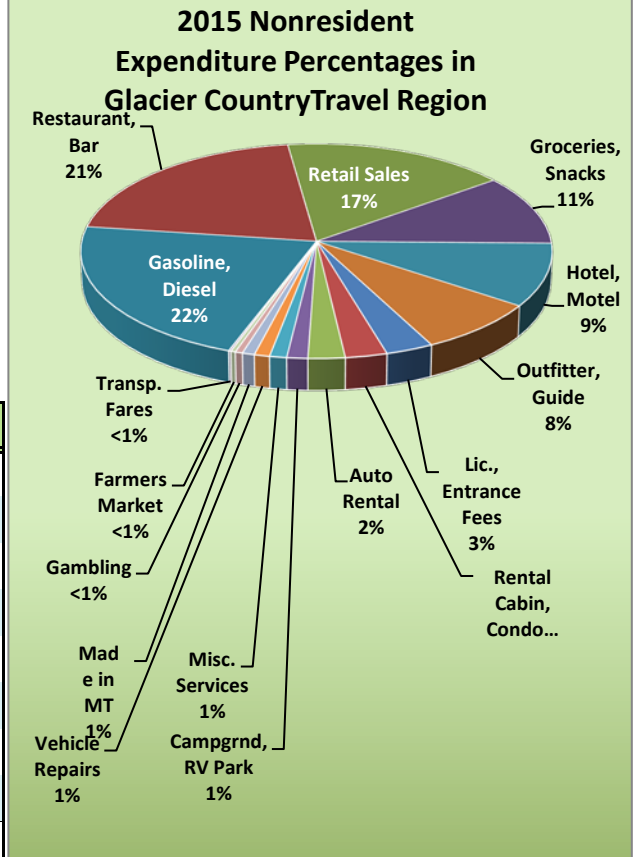
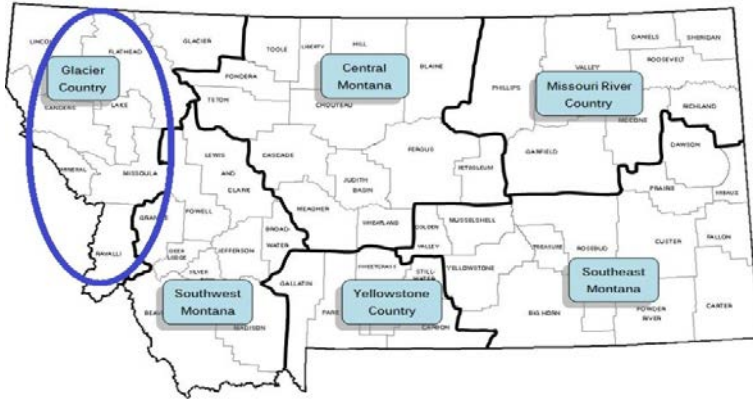


Table 1 - Total Nonresident Spending in Glacier Country*⁰

Gasoline, Diesel	\$252,402,000	Auto Rental	\$27,002,000
Restaurant, Bar	\$240,514,000	Campground, RV Park	\$15,278,000
Retail Sales	\$195,560,000	Misc. Services	\$12,491,000
Groceries, Snacks	\$123,926,000	Vehicle Repairs	\$11,216,000
Hotel, Motel	\$110,210,000	Made in MT	\$8,959,000
Outfitter, Guide	\$91,189,000	Gambling	\$5,406,000
Lic., Entrance Fees	\$35,034,000	Farmers Market	\$3,372,000
Rental Cabin, Condo	\$30,682,000	Transportation Fares	\$1,815,000
TOTAL \$1,165,056,000			

2015 Contribution of Nonresident Traveler Expenditures in Glacier Country Travel Region

- 2015 average spending* in Glacier Country by nonresident visitors to Montana totaled \$1.17 billion.
- This \$1.17 billion in local spending directly supports \$806.7 million of economic activity in the region, and supports an additional \$557.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.4 billion.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$806,699,000	\$274,555,000	\$282,547,000	\$1,363,801,000
Employment (# of jobs)	13,040	2,240	2,500	17,780
Employee Compensation	\$267,604,000	\$58,228,000	\$75,964,000	\$401,796,000
Proprietor Income	\$43,372,000	\$16,308,000	\$13,863,000	\$73,543,000
Other Property Type Income	\$88,718,000	\$53,587,000	\$51,780,000	\$194,085,000
State & Local Taxes [^]	—	—	—	\$59,555,000

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

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

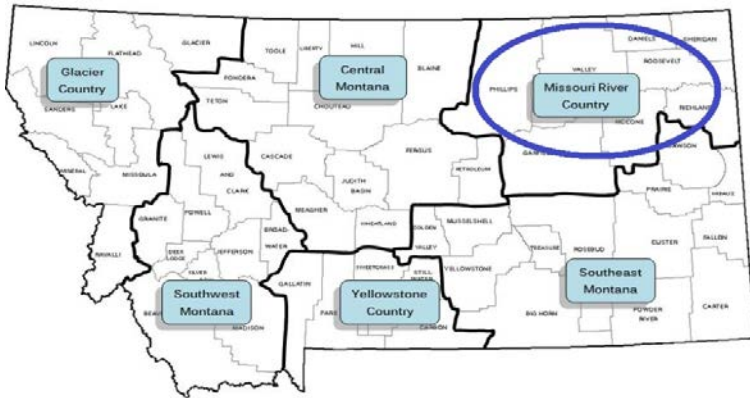
*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊ Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Missouri River Country Travel Region

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Missouri River Country Travel Region



2015 Nonresident Expenditure Percentages in Missouri River Country Travel Region

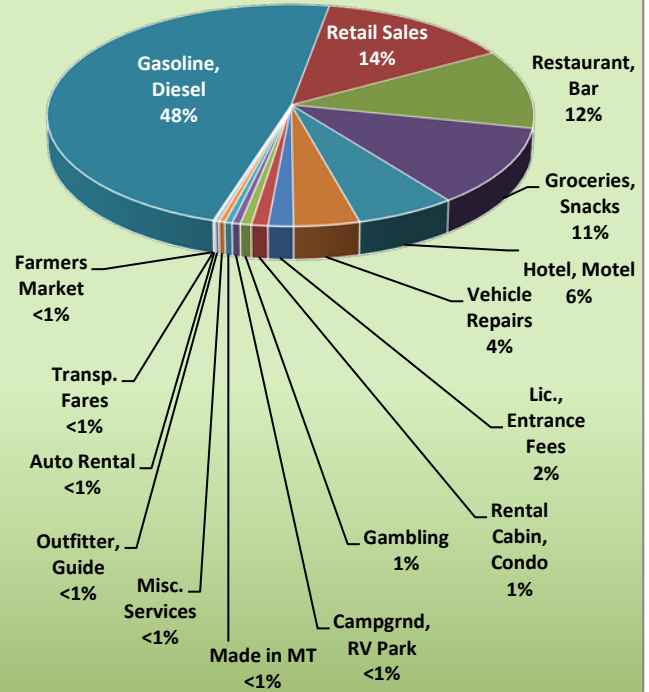


Table 1 - Total Nonresident Spending in Missouri River Country^{*,0}

Gasoline, Diesel	\$53,034,000	Gambling	\$731,000
Retail Sales	\$15,471,000	Campground, RV Park	\$545,000
Restaurant, Bar	\$12,816,000	Made in MT	\$493,000
Groceries, Snacks	\$12,662,000	Misc. Services	\$401,000
Hotel, Motel	\$6,707,000	Outfitter, Guide	\$265,000
Vehicle Repairs	\$4,392,000	Auto Rental	\$128,000
Lic., Entrance Fees	\$1,688,000	Transportation Fares	\$14,000
Rental Cabin, Condo	\$1,104,000	Farmers Market	<i>Insufficient Sample Size</i>
TOTAL		\$110,451,000	

2015 Contribution of Nonresident Traveler Expenditures in Missouri River Country Travel Region

- 2015 average spending* in Missouri River Country by nonresident visitors to Montana totaled \$110.5 million.
- This \$110.5 million in local spending directly supports \$57.9 million of economic activity in the region, and supports an additional \$24.3 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$82.1 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$57,874,000	\$11,901,000	\$12,372,000	\$82,147,000
Employment (# of jobs)	790	90	100	980
Employee Compensation	\$20,790,000	\$2,757,000	\$3,096,000	\$26,643,000
Proprietor Income	\$4,429,000	\$476,000	\$515,000	\$5,420,000
Other Property Type Income	\$6,438,000	\$1,663,000	\$2,333,000	\$10,434,000
State & Local Taxes [^]	—	—	—	\$4,544,000

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

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

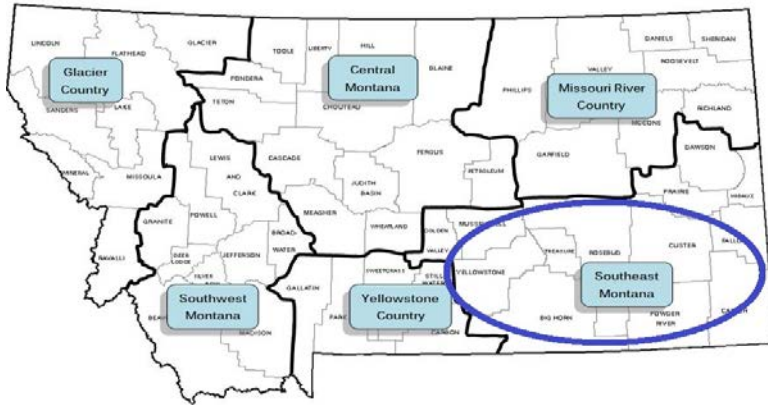
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⁰Expenditure category totals may not add to overall total due to rounding. [^] Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Southeast Montana Travel Region

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Southeast Montana Travel Region



2015 Nonresident Expenditure Percentages in Southeast Montana Travel Region

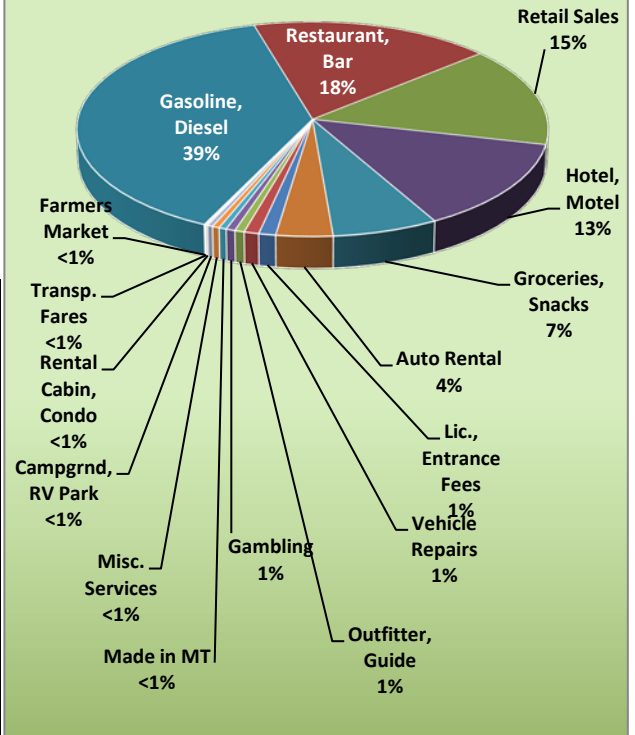


Table 1 - Total Nonresident Spending in Southeast Montana*⁰

Gasoline, Diesel	\$216,943,000	Outfitter, Guide	\$3,403,000
Restaurant, Bar	\$100,971,000	Gambling	\$3,214,000
Retail Sales	\$84,733,000	Made in MT	\$2,651,000
Hotel, Motel	\$74,590,000	Misc. Services	\$2,499,000
Groceries, Snacks	\$37,369,000	Campground, RV Park	\$1,919,000
Auto Rental	\$19,983,000	Rental Cabin, Condo	\$669,000
Lic., Entrance Fees	\$5,977,000	Transportation Fares	\$470,000
Vehicle Repairs	\$5,185,000	Farmers Market	\$165,000
TOTAL		\$560,741,000	

2015 Contribution of Nonresident Traveler Expenditures in Southeast Montana Travel Region

- 2015 average spending* in Southeast Montana by nonresident visitors to Montana totaled \$560.7 million.
- This \$560.7 million in local spending directly supports \$459.9 million of economic activity in the region, and supports an additional \$250.2 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$710.1 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$459,895,000	\$133,747,000	\$116,445,000	\$710,087,000
Employment (# of jobs)	4,580	870	910	6,360
Employee Compensation	\$114,359,000	\$32,653,000	\$32,984,000	\$179,996,000
Proprietor Income	\$14,232,000	\$5,502,000	\$4,071,000	\$23,805,000
Other Property Type Income	\$63,649,000	\$24,345,000	\$22,400,000	\$110,394,000
State & Local Taxes [^]	—	—	—	\$28,759,000

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

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

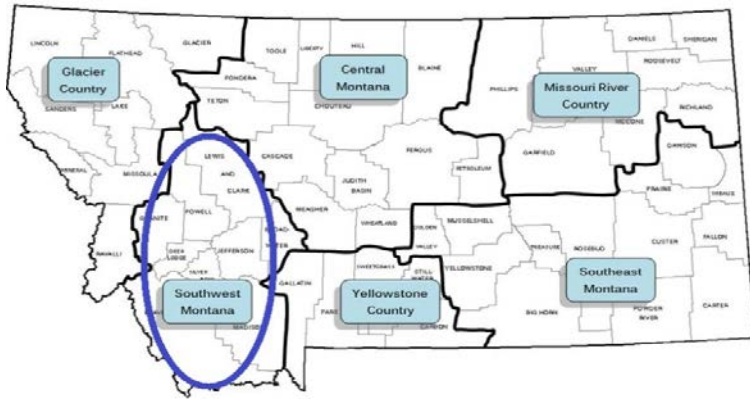
*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊ Expenditure category totals may not add to overall total due to rounding. [^] Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Southwest Montana Travel Region

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Southwest Montana Travel Region



2015 Nonresident Expenditure Percentages in Southwest Montana Travel Region

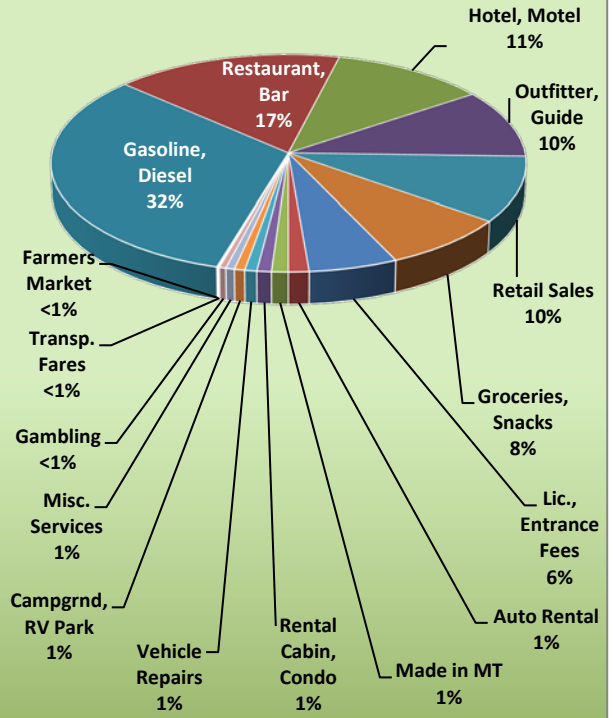


Table 1 - Total Nonresident Spending in Southwest Montana*⁰

Gasoline, Diesel	\$118,461,000	Made in MT	\$3,779,000
Restaurant, Bar	\$61,864,000	Rental Cabin, Condo	\$3,288,000
Hotel, Motel	\$42,012,000	Vehicle Repairs	\$2,741,000
Outfitter, Guide	\$37,351,000	Campground, RV Park	\$2,353,000
Retail Sales	\$35,449,000	Misc. Services	\$1,973,000
Groceries, Snacks	\$29,174,000	Gambling	\$1,510,000
Lic., Entrance Fees	\$20,287,000	Transportation Fares	\$327,000
Auto Rental	\$4,673,000	Farmers Market	\$278,000
TOTAL	\$365,520,000		

2015 Contribution of Nonresident Traveler Expenditures in Southwest Montana Travel Region

- 2015 average spending* in Southwest Montana by nonresident visitors to Montana totaled \$365.5 million.
- This \$365.5 million in local spending directly supports \$233.3 million of economic activity in the region, and supports an additional \$132.2 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$365.5 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$233,262,000	\$58,533,000	\$73,678,000	\$365,473,000
Employment (# of jobs)	3,290	470	630	4,390
Employee Compensation	\$84,057,000	\$13,759,000	\$19,810,000	\$117,626,000
Proprietor Income	\$15,937,000	\$3,834,000	\$3,669,000	\$23,440,000
Other Property Type Income	\$26,121,000	\$8,663,000	\$13,026,000	\$47,810,000
State & Local Taxes [^]	—	—	—	\$16,788,000

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

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

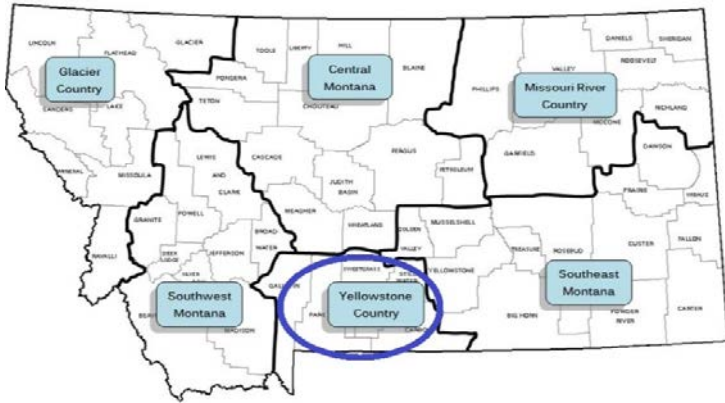
*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

⁰Expenditure category totals may not add to overall total due to rounding. [^] Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone Country Travel Region

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Yellowstone Country Travel Region



2015 Nonresident Expenditure Percentages in Yellowstone Country Travel Region

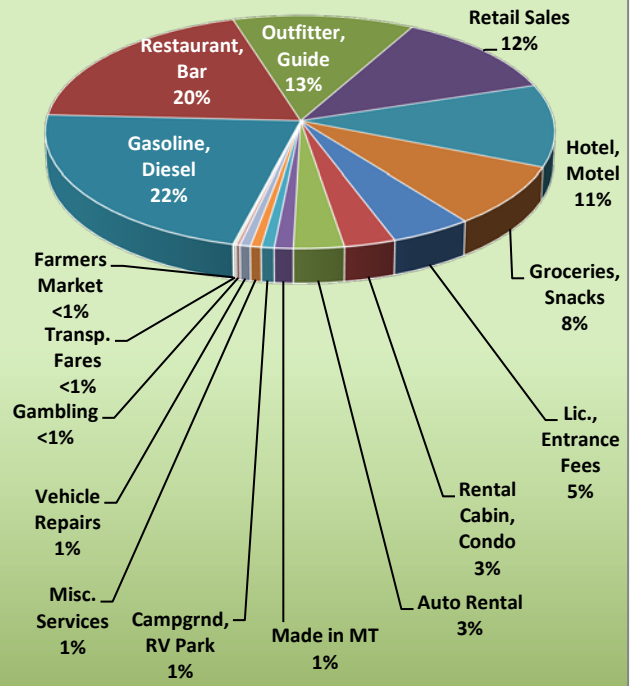


Table 1 - Total Nonresident Spending in Yellowstone Country*⁰

Gasoline, Diesel	\$208,192,000	Auto Rental	\$27,764,000
Restaurant, Bar	\$185,237,000	Made in MT	\$10,342,000
Outfitter, Guide	\$119,173,000	Campground, RV Park	\$7,090,000
Retail Sales	\$114,260,000	Misc. Services	\$5,903,000
Hotel, Motel	\$108,729,000	Vehicle Repairs	\$5,692,000
Groceries, Snacks	\$80,119,000	Gambling	\$2,268,000
Lic., Entrance Fees	\$44,815,000	Transportation Fares	\$1,219,000
Rental Cabin, Condo	\$28,285,000	Farmers Market	\$465,000
TOTAL	\$949,553,000		

2015 Contribution of Nonresident Traveler Expenditures in Yellowstone Country Travel Region

- 2015 average spending* in Yellowstone Country by nonresident visitors to Montana totaled \$949.6 million.
- This \$949.6 million in local spending directly supports \$683.6 million of economic activity in the region, and supports an additional \$409.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.1 billion.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$683,562,000	\$219,298,000	\$190,466,000	\$1,093,326,000
Employment (# of jobs)	10,810	1,750	1,650	14,210
Employee Compensation	\$239,932,000	\$47,013,000	\$48,937,000	\$335,882,000
Proprietor Income	\$21,377,000	\$13,941,000	\$9,996,000	\$45,314,000
Other Property Type Income	\$73,173,000	\$47,105,000	\$39,050,000	\$159,328,000
State & Local Taxes [^]	—	—	—	\$47,170,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

Montana Counties - 2015 Nonresident Economic Impacts

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2015 Nonresident Traveler Expenditures & Economic Contribution in Beaverhead County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Beaverhead County

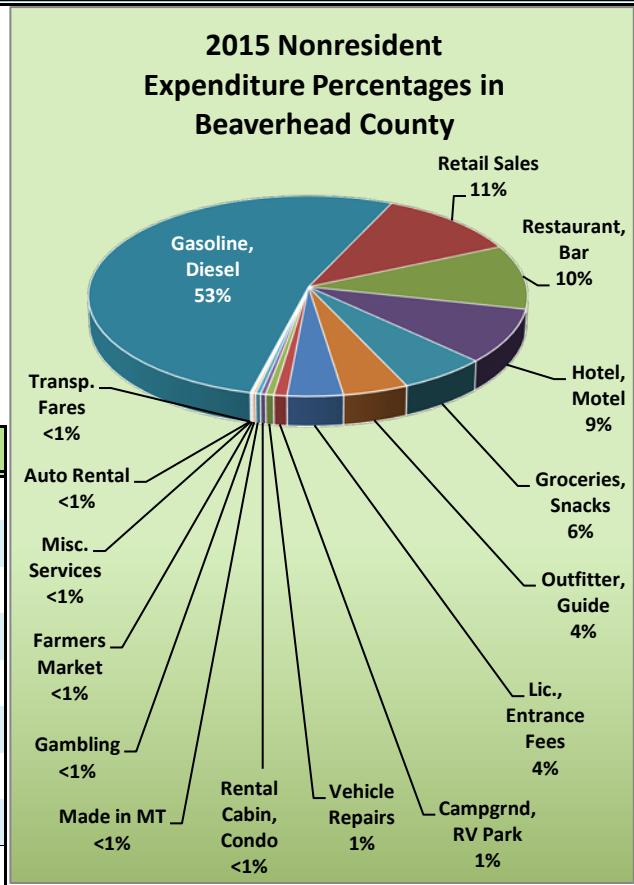


Table 1 - Total Nonresident Spending in Beaverhead County*⁰

Gasoline, Diesel	\$29,198,000	Vehicle Repairs	\$303,000
Retail Sales	\$6,298,000	Rental Cabin, Condo	\$189,000
Restaurant, Bar	\$5,749,000	Made in MT	\$182,000
Hotel, Motel	\$4,833,000	Gambling	\$86,000
Groceries, Snacks	\$3,296,000	Farmers Market	\$60,000
Outfitter, Guide	\$2,436,000	Misc. Services	\$58,000
Lic., Entrance Fees	\$2,072,000	Auto Rental	<i>Insufficient Sample Size</i>
Campground, RV Park	\$487,000	Transportation Fares	<i>Insufficient Sample Size</i>
TOTAL	\$55,247,000		

2015 Contribution of Nonresident Traveler Expenditures in Beaverhead County

- 2015 average spending* in Beaverhead County by nonresident visitors to Montana totaled \$55.2 million.
- This \$55.2 million in local spending directly supports \$27.3 million of economic activity in the region, and supports an additional \$11.5 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$38.8 million.

Table 2 - 2015 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$27,325,000	\$6,274,000	\$5,225,000	\$38,824,000
Employment (# of jobs)	440	60	50	550
Employee Compensation	\$8,898,000	\$1,102,000	\$1,201,000	\$11,201,000
Proprietor Income	\$831,000	\$364,000	\$231,000	\$1,426,000
Other Property Type Income	\$2,673,000	\$1,079,000	\$1,049,000	\$4,801,000
State & Local Taxes [^]	—	—	—	\$2,040,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊ Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Carbon County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Carbon County

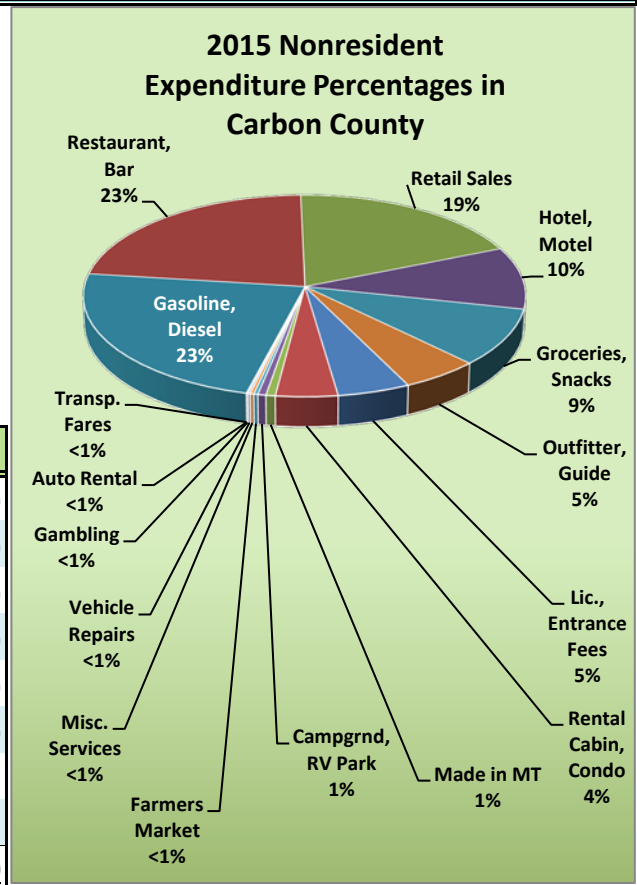


Table 1 - Total Nonresident Spending in Carbon County*⁰

Gasoline, Diesel	\$13,919,000	Made in MT	\$373,000
Restaurant, Bar	\$13,567,000	Campground, RV Park	\$327,000
Retail Sales	\$11,360,000	Farmers Market	\$162,000
Hotel, Motel	\$5,992,000	Misc. Services	\$139,000
Groceries, Snacks	\$5,492,000	Vehicle Repairs	\$94,000
Outfitter, Guide	\$3,151,000	Gambling	\$69,000
Lic., Entrance Fees	\$2,918,000	Auto Rental	<i>Insufficient Sample Size</i>
Rental Cabin, Condo	\$2,486,000	Transportation Fares	<i>Insufficient Sample Size</i>
TOTAL	\$60,049,000		

2015 Contribution of Nonresident Traveler Expenditures in Carbon County

- 2015 average spending* in Carbon County by nonresident visitors to Montana totaled \$60.0 million.
- This \$60.0 million in local spending directly supports \$37.3 million of economic activity in the region, and supports an additional \$15.0 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$52.3 million.

Table 2 - 2015 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$37,302,000	\$8,958,000	\$6,038,000	\$52,298,000
Employment (# of jobs)	670	90	60	820
Employee Compensation	\$11,976,000	\$1,370,000	\$1,104,000	\$14,450,000
Proprietor Income	\$2,306,000	\$629,000	\$331,000	\$3,266,000
Other Property Type Income	\$3,583,000	\$1,254,000	\$1,305,000	\$6,142,000
State & Local Taxes [^]	—	—	—	\$2,280,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Cascade County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Cascade County



2015 Nonresident Expenditure Percentages in Cascade County

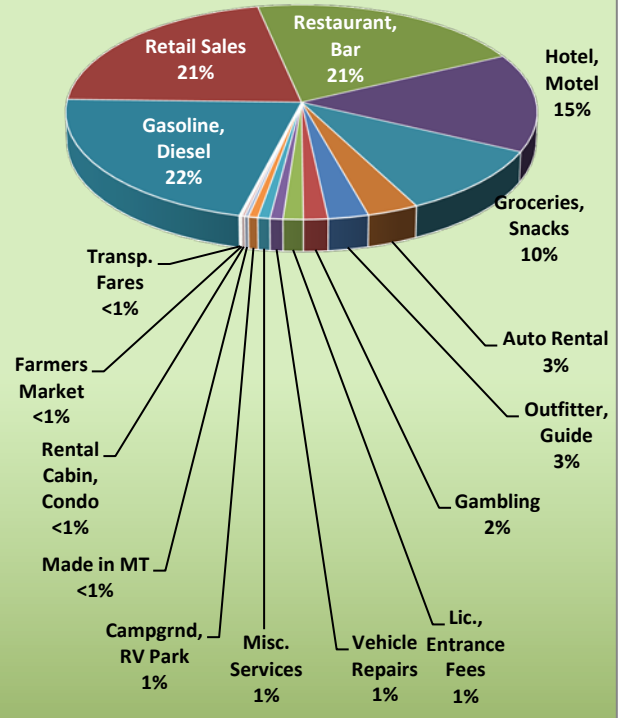


Table 1 - Total Nonresident Spending in Cascade County*

Gasoline, Diesel	\$53,819,000	Lic., Entrance Fees	\$3,154,000
Retail Sales	\$53,195,000	Vehicle Repairs	\$2,013,000
Restaurant, Bar	\$52,000,000	Misc. Services	\$1,894,000
Hotel, Motel	\$36,978,000	Campground, RV Park	\$1,472,000
Groceries, Snacks	\$25,474,000	Made in MT	\$593,000
Auto Rental	\$8,064,000	Rental Cabin, Condo	\$441,000
Outfitter, Guide	\$6,348,000	Farmers Market	\$244,000
Gambling	\$3,831,000	Transportation Fares	\$193,000
TOTAL	\$249,713,000		

2015 Contribution of Nonresident Traveler Expenditures in Cascade County

- 2015 average spending* in Cascade County by nonresident visitors to Montana totaled \$249.7 million.
- This \$249.7 million in local spending directly supports \$212.2 million of economic activity in the region, and supports an additional \$123.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$336.1 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$212,244,000	\$63,307,000	\$60,571,000	\$336,122,000
Employment (# of jobs)	3,600	520	520	4,640
Employee Compensation	\$50,258,000	\$15,948,000	\$16,961,000	\$83,167,000
Proprietor Income	\$14,644,000	\$3,725,000	\$3,045,000	\$21,414,000
Other Property Type Income	\$22,507,000	\$8,832,000	\$9,790,000	\$41,129,000
State & Local Taxes [^]	—	—	—	\$11,995,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Custer County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Custer County



2015 Nonresident Expenditure Percentages in Custer County

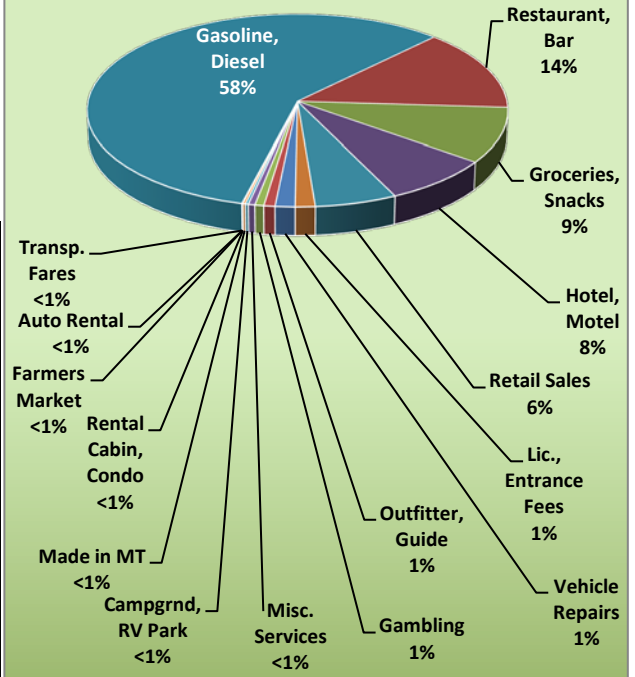


Table 1 - Total Nonresident Spending in Custer*⁰

Gasoline, Diesel	\$50,494,000	Gambling	\$541,000
Restaurant, Bar	\$11,926,000	Misc. Services	\$399,000
Groceries, Snacks	\$7,982,000	Campground, RV Park	\$189,000
Hotel, Motel	\$6,723,000	Made in MT	\$156,000
Retail Sales	\$4,997,000	Rental Cabin, Condo	\$54,000
Lic., Entrance Fees	\$1,214,000	Farmers Market	\$6,000
Vehicle Repairs	\$1,203,000	Auto Rental	<i>Insufficient Sample Size</i>
Outfitter, Guide	\$676,000	Transportation Fares	<i>Insufficient Sample Size</i>
TOTAL	\$86,560,000		

2015 Contribution of Nonresident Traveler Expenditures in Custer County

- 2015 average spending* in Custer County by nonresident visitors to Montana totaled \$86.6 million.
- This \$86.6 million in local spending directly supports \$41.9 million of economic activity in the region, and supports an additional \$20.7 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$62.5 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$41,845,000	\$10,127,000	\$10,568,000	\$62,540,000
Employment (# of jobs)	620	90	100	810
Employee Compensation	\$14,245,000	\$2,700,000	\$2,976,000	\$19,921,000
Proprietor Income	\$1,379,000	\$528,000	\$403,000	\$2,310,000
Other Property Type Income	\$4,295,000	\$1,970,000	\$2,038,000	\$8,303,000
State & Local Taxes [^]	—	—	—	\$3,267,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊ Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Flathead County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Flathead County

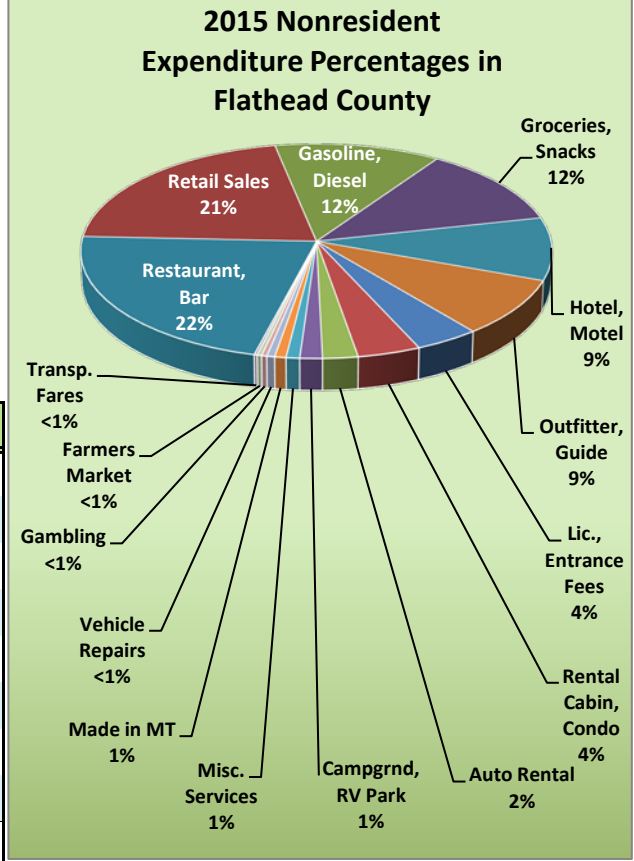


Table 1 - Total Nonresident Spending in Flathead County*⁰

Restaurant, Bar	\$130,690,000	Auto Rental	\$13,261,000
Retail Sales	\$126,811,000	Campground, RV Park	\$8,439,000
Gasoline, Diesel	\$74,220,000	Misc. Services	\$5,082,000
Groceries, Snacks	\$72,326,000	Made in MT	\$4,228,000
Hotel, Motel	\$56,514,000	Vehicle Repairs	\$2,962,000
Outfitter, Guide	\$51,158,000	Gambling	\$1,982,000
Lic., Entrance Fees	\$24,333,000	Farmers Market	\$1,657,000
Rental Cabin, Condo	\$23,737,000	Transportation Fares	\$1,165,000
TOTAL	\$598,565,000		

2015 Contribution of Nonresident Traveler Expenditures in Flathead County

- 2015 average spending* in Flathead County by nonresident visitors to Montana totaled \$598.6 million.
- This \$598.6 million in local spending directly supports \$424.8 million of economic activity in the region, and supports an additional \$280.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$705.6 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$424,753,000	\$138,107,000	\$142,696,000	\$705,556,000
Employment (# of jobs)	7,130	1,160	1,270	9,560
Employee Compensation	\$146,965,000	\$27,744,000	\$38,187,000	\$212,896,000
Proprietor Income	\$20,699,000	\$10,791,000	\$8,788,000	\$40,278,000
Other Property Type Income	\$47,032,000	\$28,184,000	\$26,697,000	\$101,913,000
State & Local Taxes [^]	—	—	—	\$29,973,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

⁰Expenditure category totals may not add to overall total due to rounding. [^] Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Gallatin County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Gallatin County



2015 Nonresident Expenditure Percentages in Gallatin County

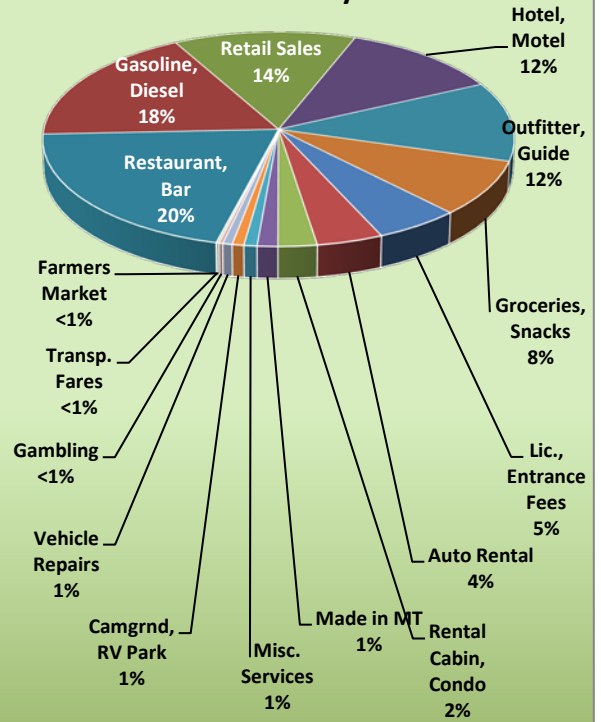


Table 1 - Total Nonresident Spending in Gallatin County^{*,0}

Restaurant, Bar	\$135,646,000	Rental Cabin, Condo	\$16,267,000
Gasoline, Diesel	\$118,860,000	Made in MT	\$8,556,000
Retail Sales	\$90,587,000	Misc. Services	\$5,459,000
Hotel, Motel	\$79,743,000	Campground, RV Park	\$4,857,000
Outfitter, Guide	\$79,718,000	Vehicle Repairs	\$3,961,000
Groceries, Snacks	\$55,313,000	Gambling	\$1,516,000
Lic., Entrance Fees	\$35,768,000	Transportation Fares	\$1,049,000
Auto Rental	\$27,752,000	Farmers Market	\$224,000
TOTAL	\$665,276,000		

2015 Contribution of Nonresident Traveler Expenditures in Gallatin County

- 2015 average spending* in Gallatin County by nonresident visitors to Montana totaled \$665.3 million.
- This \$665.3 million in local spending directly supports \$485.6 million of economic activity in the region, and supports an additional \$306.5 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$792.1 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$485,596,000	\$159,456,000	\$146,994,000	\$792,046,000
Employment (# of jobs)	7,700	1,270	1,270	10,240
Employee Compensation	\$170,584,000	\$35,214,000	\$39,857,000	\$245,655,000
Proprietor Income	\$14,445,000	\$10,150,000	\$7,625,000	\$32,220,000
Other Property Type Income	\$53,950,000	\$35,345,000	\$29,616,000	\$118,911,000
State & Local Taxes [^]	—	—	—	\$35,086,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Glacier County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Glacier County



2015 Nonresident Expenditure Percentages in Glacier County

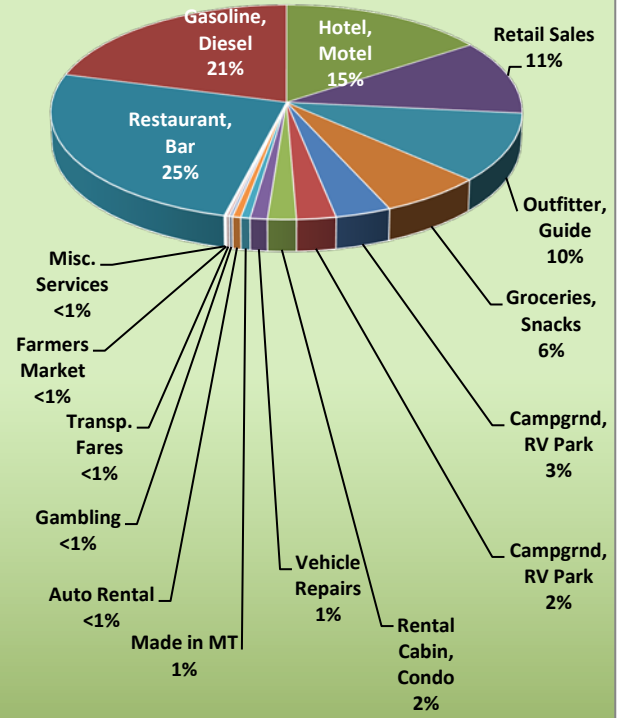


Table 1 - Total Nonresident Spending in Glacier County*⁰

Restaurant, Bar	\$22,800,000	Rental Cabin, Condo	\$1,614,000
Gasoline, Diesel	\$18,588,000	Vehicle Repairs	\$965,000
Hotel, Motel	\$13,826,000	Made in MT	\$524,000
Retail Sales	\$10,059,000	Auto Rental	\$463,000
Outfitter, Guide	\$9,283,000	Gambling	\$198,000
Groceries, Snacks	\$5,787,000	Transportation Fares	\$152,000
Campground, RV Park	\$3,141,000	Farmers Market	\$67,000
Lic., Entrance Fees	\$2,218,000	Misc. Services	\$62,000
TOTAL	\$89,747,000		

2015 Contribution of Nonresident Traveler Expenditures in Glacier County

- 2015 average spending* in Glacier County by nonresident visitors to Montana totaled \$89.7 million.
- This \$89.7 million in local spending directly supports \$64.3 million of economic activity in the region, and supports an additional \$17.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$82.3 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$64,326,000	\$9,959,000	\$7,979,000	\$82,264,000
Employment (# of jobs)	1,150	80	60	1,290
Employee Compensation	\$19,995,000	\$2,007,000	\$1,740,000	\$23,742,000
Proprietor Income	\$2,841,000	\$606,000	\$314,000	\$3,761,000
Other Property Type Income	\$6,709,000	\$836,000	\$1,475,000	\$9,020,000
State & Local Taxes [^]	—	—	—	\$3,738,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊ Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Lewis and Clark County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Lewis and Clark

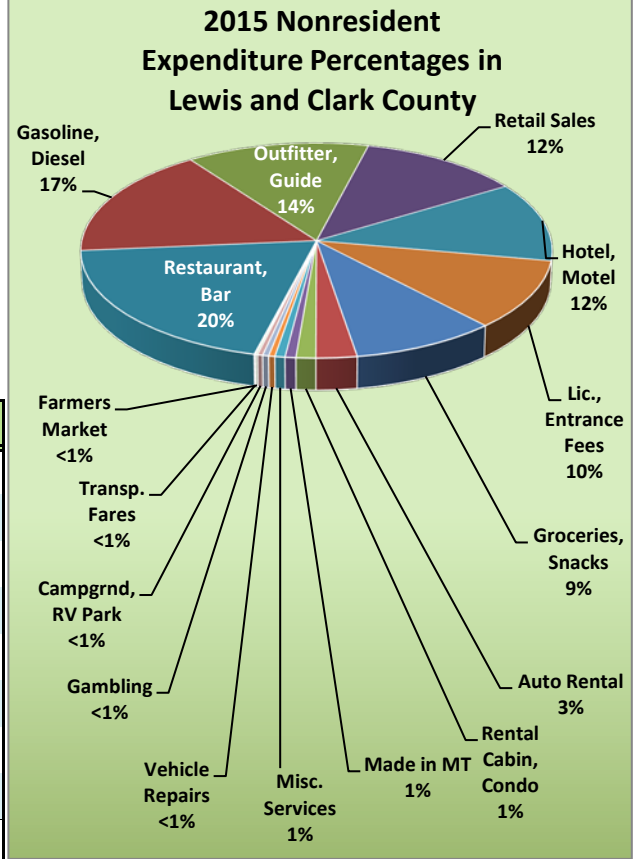


Table 1 - Total Nonresident Spending in Lewis and Clark County*⁰

Restaurant, Bar	\$26,678,000	Rental Cabin, Condo	\$1,676,000
Gasoline, Diesel	\$22,624,000	Made in MT	\$917,000
Outfitter, Guide	\$18,537,000	Misc. Services	\$857,000
Retail Sales	\$16,476,000	Vehicle Repairs	\$530,000
Hotel, Motel	\$16,243,000	Gambling	\$513,000
Lic., Entrance Fees	\$14,029,000	Campground, RV Park	\$448,000
Groceries, Snacks	\$12,428,000	Transportation Fares	\$169,000
Auto Rental	\$3,483,000	Farmers Market	\$118,000
TOTAL	\$135,726,000		

2015 Contribution of Nonresident Traveler Expenditures in Lewis and Clark County

- 2015 average spending* in Lewis & Clark County by nonresident visitors to Montana totaled \$135.7 million.
- This \$135.7 million in local spending directly supports \$96.5 million of economic activity in the region, and supports an additional \$60.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$156.6 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$96,472,000	\$29,696,000	\$30,444,000	\$156,612,000
Employment (# of jobs)	1,590	240	270	2,100
Employee Compensation	\$33,192,000	\$7,459,000	\$8,795,000	\$49,446,000
Proprietor Income	\$2,882,000	\$1,355,000	\$1,103,000	\$5,340,000
Other Property Type Income	\$10,707,000	\$5,071,000	\$5,499,000	\$21,277,000
State & Local Taxes [^]	—	—	—	\$7,099,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Lincoln County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Lincoln



2015 Nonresident Expenditure Percentages in Lincoln County

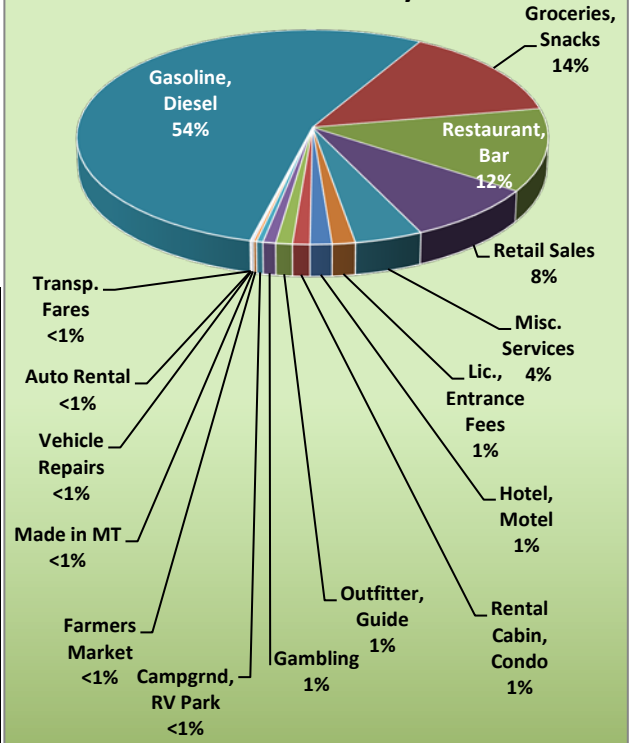


Table 1 - Total Nonresident Spending in Lincoln County*,⁰

Gasoline, Diesel	\$39,374,000	Outfitter, Guide	\$753,000
Groceries, Snacks	\$10,093,000	Gambling	\$579,000
Restaurant, Bar	\$9,038,000	Campground, RV Park	\$295,000
Retail Sales	\$6,110,000	Farmers Market	\$141,000
Misc. Services	\$3,108,000	Made in MT	\$88,000
Lic., Entrance Fees	\$1,054,000	Vehicle Repairs	\$63,000
Hotel, Motel	\$991,000	Auto Rental	<i>Insufficient Sample Size</i>
Rental Cabin, Condo	\$787,000	Transportation Fares	<i>Insufficient Sample Size</i>
TOTAL	\$72,474,000		

2015 Contribution of Nonresident Traveler Expenditures in Lincoln County

- 2015 average spending* in Lincoln County by nonresident visitors to Montana totaled \$72.5 million.
- This \$72.5 million in local spending directly supports \$34.1 million of economic activity in the region, and supports an additional \$15.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$49.7 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$34,112,000	\$7,908,000	\$7,714,000	\$49,734,000
Employment (# of jobs)	530	70	70	670
Employee Compensation	\$9,949,000	\$1,189,000	\$1,707,000	\$12,845,000
Proprietor Income	\$3,640,000	\$454,000	\$322,000	\$4,416,000
Other Property Type Income	\$2,770,000	\$1,542,000	\$1,579,000	\$5,891,000
State & Local Taxes [^]	—	—	—	\$2,840,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

⁰Expenditure category totals may not add to overall total due to rounding. [^] Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Madison County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Madison County



2015 Nonresident Expenditure Percentages in Madison County

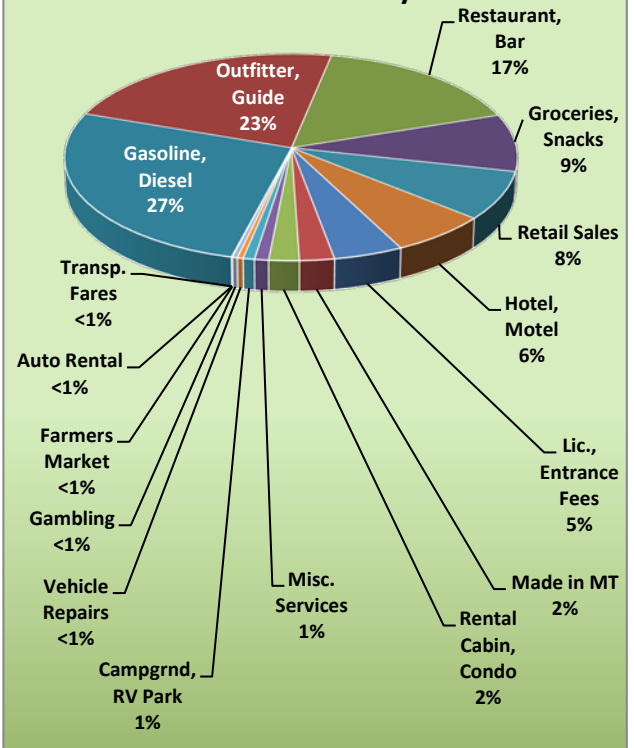


Table 1 - Total Nonresident Spending in Madison County^{*,0}

Gasoline, Diesel	\$13,115,000	Rental Cabin, Condo	\$974,000
Outfitter, Guide	\$11,086,000	Misc. Services	\$449,000
Restaurant, Bar	\$8,169,000	Campground, RV Park	\$363,000
Groceries, Snacks	\$4,410,000	Vehicle Repairs	\$185,000
Retail Sales	\$3,714,000	Gambling	\$165,000
Hotel, Motel	\$3,186,000	Farmers Market	\$29,000
Lic., Entrance Fees	\$2,233,000	Auto Rental	<i>Insufficient Sample Size</i>
Made in MT	\$1,115,000	Transportation Fares	<i>Insufficient Sample Size</i>
TOTAL	\$49,193,000		

2015 Contribution of Nonresident Traveler Expenditures in Madison County

- 2015 average spending* in Madison County by nonresident visitors to Montana totaled \$49.2 million.
- This \$49.2 million in local spending directly supports \$31.7 million of economic activity in the region, and supports an additional \$11.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$43.6 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$31,711,000	\$5,536,000	\$6,339,000	\$43,586,000
Employment (# of jobs)	450	50	50	550
Employee Compensation	\$13,904,000	\$939,000	\$1,313,000	\$16,156,000
Proprietor Income	\$1,461,000	\$676,000	\$384,000	\$2,521,000
Other Property Type Income	\$3,416,000	\$990,000	\$1,479,000	\$5,884,000
State & Local Taxes [^]	—	—	—	\$1,730,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

0 Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Missoula County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Missoula County

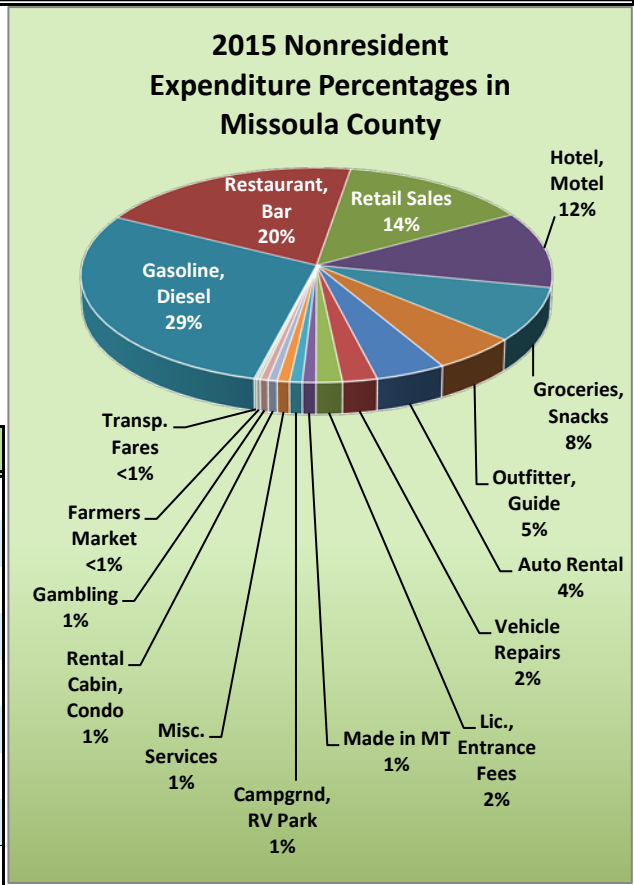


Table 1 - Total Nonresident Spending in Missoula County*⁰

Gasoline, Diesel	\$85,636,000	Lic., Entrance Fees	\$4,888,000
Restaurant, Bar	\$58,794,000	Made in MT	\$2,493,000
Retail Sales	\$42,133,000	Campground, RV Park	\$2,350,000
Hotel, Motel	\$34,356,000	Misc. Services	\$2,287,000
Groceries, Snacks	\$24,057,000	Rental Cabin, Condo	\$1,702,000
Outfitter, Guide	\$15,931,000	Gambling	\$1,490,000
Auto Rental	\$13,133,000	Farmers Market	\$665,000
Vehicle Repairs	\$6,490,000	Transportation Fares	\$448,000
TOTAL	\$296,853,000		

2015 Contribution of Nonresident Traveler Expenditures in Missoula County

- 2015 average spending* in Missoula County by nonresident visitors to Montana totaled \$296.9 million.
- This \$296.9 million in local spending directly supports \$203.6 million of economic activity in the region, and supports an additional \$153.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$357.2 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$203,582,000	\$75,627,000	\$77,950,000	\$357,159,000
Employment (# of jobs)	3,130	600	700	4,430
Employee Compensation	\$63,857,000	\$18,251,000	\$22,314,000	\$104,422,000
Proprietor Income	\$11,429,000	\$3,477,000	\$3,326,000	\$18,232,000
Other Property Type Income	\$25,895,000	\$16,426,000	\$14,947,000	\$57,268,000
State & Local Taxes [^]	—	—	—	\$16,494,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Park County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Park County

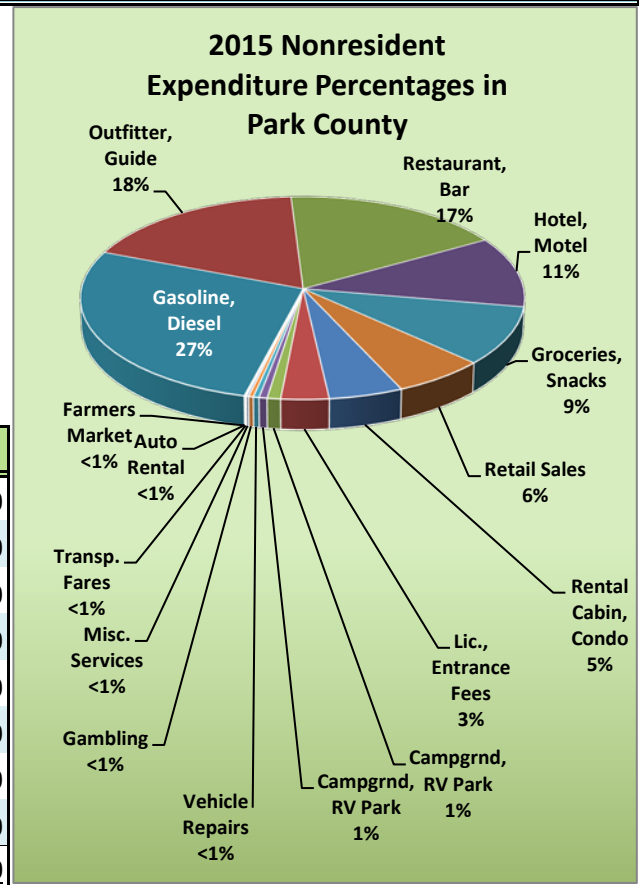


Table 1 - Total Nonresident Spending in Park County*⁰

Gasoline, Diesel	\$50,644,000	Campground, RV Park	\$1,654,000
Outfitter, Guide	\$33,379,000	Made in MT	\$994,000
Restaurant, Bar	\$32,520,000	Vehicle Repairs	\$720,000
Hotel, Motel	\$21,052,000	Gambling	\$566,000
Groceries, Snacks	\$17,286,000	Misc. Services	\$302,000
Retail Sales	\$11,563,000	Transportation Fares	\$170,000
Rental Cabin, Condo	\$9,182,000	Farmers Market	\$79,000
Lic., Entrance Fees	\$5,930,000	Auto Rental	\$12,000
TOTAL		\$186,053,000	

2015 Contribution of Nonresident Traveler Expenditures in Park County

- 2015 average spending* in Park County by nonresident visitors to Montana totaled \$186.1 million.
- This \$186.1 million in local spending directly supports \$122.6 million of economic activity in the region, and supports an additional \$142.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$165.2 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$122,624,000	\$23,811,000	\$18,798,000	\$165,233,000
Employment (# of jobs)	2,210	280	200	2,690
Employee Compensation	\$42,977,000	\$4,537,000	\$4,658,000	\$52,172,000
Proprietor Income	\$3,069,000	\$1,318,000	\$749,000	\$5,136,000
Other Property Type Income	\$11,542,000	\$4,591,000	\$4,115,000	\$20,248,000
State & Local Taxes [^]	—	—	—	\$6,752,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Richland County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Richland County



2015 Nonresident Expenditure Percentages in Richland County

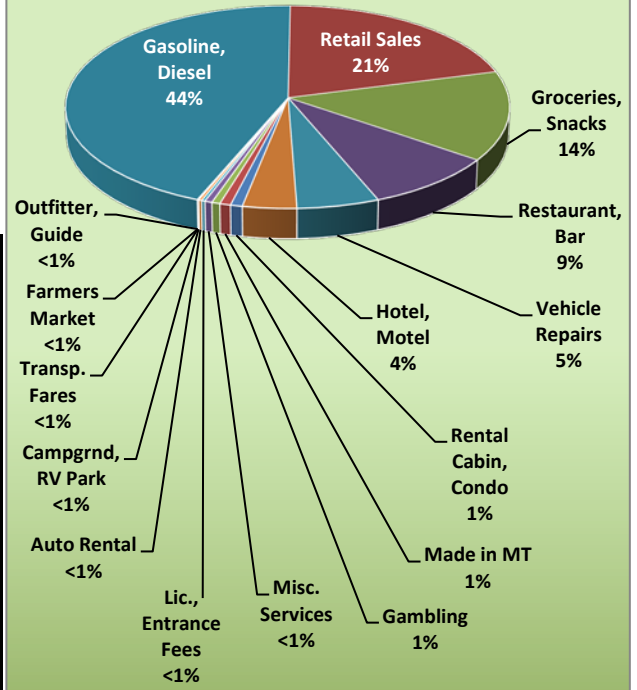


Table 1 - Total Nonresident Spending in Richland County^{*,0}

Gasoline, Diesel	\$27,500,000	Gambling	\$346,000
Retail Sales	\$12,830,000	Misc. Services	\$303,000
Groceries, Snacks	\$8,893,000	Lic., Entrance Fees	\$149,000
Restaurant, Bar	\$5,598,000	Auto Rental	\$128,000
Vehicle Repairs	\$3,423,000	Campground, RV Park	\$49,000
Hotel, Motel	\$2,242,000	Transportation Fares	\$14,000
Rental Cabin, Condo	\$493,000	Farmers Market	<i>Insufficient Sample Size</i>
Made in MT	\$451,000	Outfitter, Guide	<i>Insufficient Sample Size</i>
TOTAL		\$62,419,000	

2015 Contribution of Nonresident Traveler Expenditures in Richland County

- 2015 average spending* in Richland County by nonresident visitors to Montana totaled \$62.4 million.
- This \$62.4 million in local spending directly supports \$31.3 million of economic activity in the region, and supports an additional \$11.7 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$43.0 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$31,276,000	\$5,568,000	\$6,129,000	\$42,973,000
Employment (# of jobs)	390	40	50	480
Employee Compensation	\$12,467,000	\$1,471,000	\$1,711,000	\$15,649,000
Proprietor Income	\$2,478,000	\$190,000	\$254,000	\$2,922,000
Other Property Type Income	\$3,634,000	\$1,048,000	\$1,151,000	\$5,833,000
State & Local Taxes [^]	—	—	—	\$2,169,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Silver Bow County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Silver Bow County



2015 Nonresident Expenditure Percentages in Silver Bow County

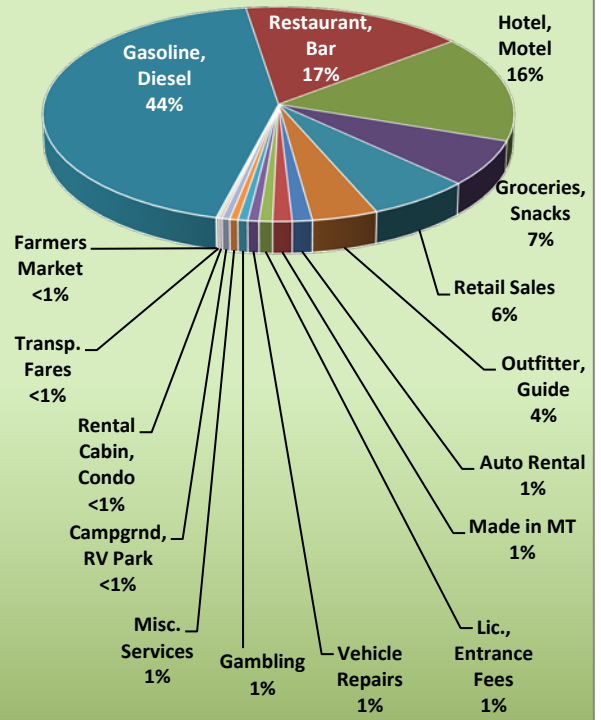


Table 1 - Total Nonresident Spending in Silver Bow County*⁰

Gasoline, Diesel	\$41,358,000	Lic., Entrance Fees	\$798,000
Restaurant, Bar	\$15,790,000	Vehicle Repairs	\$657,000
Hotel, Motel	\$15,329,000	Gambling	\$581,000
Groceries, Snacks	\$6,458,000	Misc. Services	\$486,000
Retail Sales	\$6,134,000	Campground, RV Park	\$465,000
Outfitter, Guide	\$3,923,000	Rental Cabin, Condo	\$159,000
Auto Rental	\$1,190,000	Transportation Fares	\$158,000
Made in MT	\$1,149,000	Farmers Market	\$32,000
TOTAL	\$94,667,000		

2015 Contribution of Nonresident Traveler Expenditures in Silver Bow County

- 2015 average spending* in Silver Bow County by nonresident visitors to Montana totaled \$94.7 million.
- This \$94.7 million in local spending directly supports \$57.0 million of economic activity in the region, and supports an additional \$31.0 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$88.1 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$57,041,000	\$15,447,000	\$15,591,000	\$88,079,000
Employment (# of jobs)	800	120	140	1,060
Employee Compensation	\$16,050,000	\$4,104,000	\$4,325,000	\$24,479,000
Proprietor Income	\$6,619,000	\$1,299,000	\$1,058,000	\$8,976,000
Other Property Type Income	\$6,248,000	\$1,779,000	\$2,549,000	\$10,576,000
State & Local Taxes [^]	—	—	—	\$4,313,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊ Expenditure category totals may not add to overall total due to rounding. [^] Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Toole County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Toole County



2015 Nonresident Expenditure Percentages in Toole County

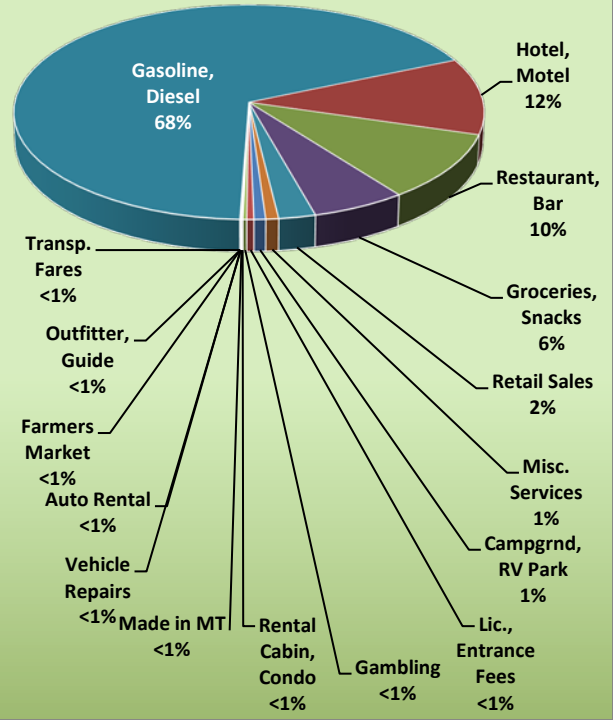


Table 1 - Total Nonresident Spending in Toole County ^{*,0}

Gasoline, Diesel	\$47,412,000	Gambling	\$165,000
Hotel, Motel	\$8,077,000	Rental Cabin, Condo	\$58,000
Restaurant, Bar	\$7,055,000	Made in MT	\$42,000
Groceries, Snacks	\$4,154,000	Vehicle Repairs	\$15,000
Retail Sales	\$1,629,000	Auto Rental	\$13,000
Misc. Services	\$565,000	Farmers Market	\$6,000
Campground, RV Park	\$509,000	Outfitter, Guide	<i>Insufficient Sample Size</i>
Lic., Entrance Fees	\$314,000	Transportation Fares	<i>Insufficient Sample Size</i>
TOTAL		\$70,014,000	

2015 Contribution of Nonresident Traveler Expenditures in Toole County

- 2015 average spending* in Toole County by nonresident visitors to Montana totaled \$70.0 million.
- This \$70.0 million in local spending directly supports \$35.2 million of economic activity in the region, and supports an additional \$11.5 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$46.6 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$35,198,000	\$6,638,000	\$4,791,000	\$46,627,000
Employment (# of jobs)	470	50	40	560
Employee Compensation	\$10,265,000	\$1,544,000	\$968,000	\$12,777,000
Proprietor Income	\$3,479,000	\$362,000	\$321,000	\$4,162,000
Other Property Type Income	\$3,891,000	\$1,259,000	\$1,153,000	\$6,303,000
State & Local Taxes [^]	—	—	—	\$2,979,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone County

by Kara Grau, M.S.

2015 Nonresident Traveler Expenditures in Yellowstone County

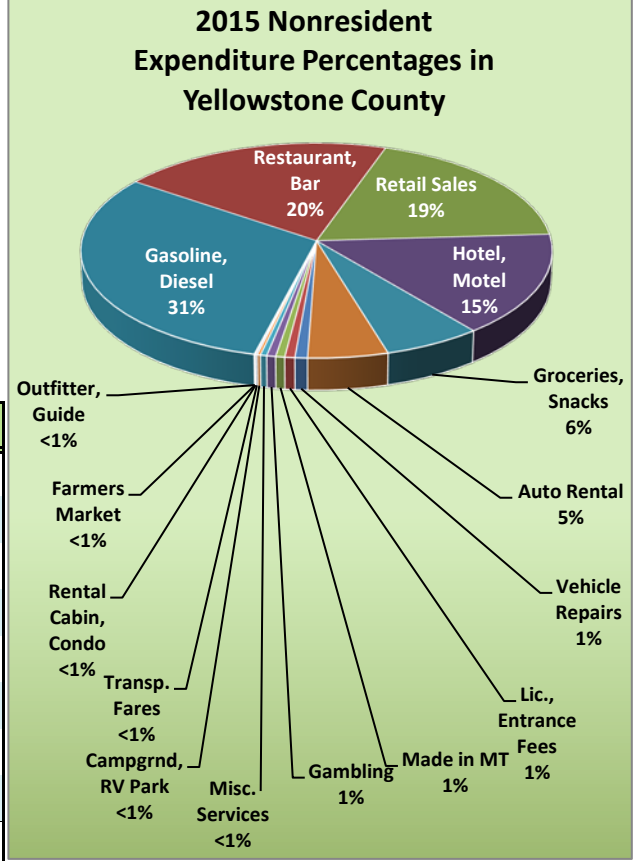


Table 1 - Total Nonresident Spending in Yellowstone County*⁰

Gasoline, Diesel	\$122,957,000	Made in MT	\$2,247,000
Restaurant, Bar	\$80,379,000	Gambling	\$2,226,000
Retail Sales	\$74,685,000	Misc. Services	\$1,582,000
Hotel, Motel	\$60,720,000	Campground, RV Park	\$781,000
Groceries, Snacks	\$24,466,000	Transportation Fares	\$470,000
Auto Rental	\$19,983,000	Rental Cabin, Condo	\$190,000
Vehicle Repairs	\$3,100,000	Farmers Market	\$135,000
Lic., Entrance Fees	\$2,497,000	Outfitter, Guide	<i>Insufficient Sample Size</i>
TOTAL		\$396,418,000	

2015 Contribution of Nonresident Traveler Expenditures in Yellowstone County

- 2015 average spending* in Yellowstone by nonresident visitors to Montana totaled \$396.4 million.
- This \$396.4 million in local spending directly supports \$316.9 million of economic activity in the region, and supports an additional \$176.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$493.9 million.

Table 2 - 2015 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$316,947,000	\$91,562,000	\$85,351,000	\$493,860,000
Employment (# of jobs)	3,390	640	680	4,710
Employee Compensation	\$82,085,000	\$24,202,000	\$25,220,000	\$131,507,000
Proprietor Income	\$8,649,000	\$3,775,000	\$3,061,000	\$15,485,000
Other Property Type Income	\$45,706,000	\$18,334,000	\$1,707,000	\$65,747,000
State & Local Taxes [^]	–	–	–	\$20,252,000

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

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

*Data is collected at the state level. The two-year average of expenditures (2015 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

2015 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2017

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