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

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

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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 15 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.

For the analyses highlighted in this report, the 2011 (inflation adjusted to 2012 \$s) and 2012 county spending estimates were averaged. Doing so helps to account for small sample sizes within some counties, and the variations in county spending patterns that may occur from year to year because of these small sample sizes. The statewide total 2011-2012 average spending is presented below.

Table 1 - 2011-2012 Average Nonresident Spending per Expenditure Category

Expenditure Category	2011-2012 Total Nonresident Spending (2012 \$s)
Gasoline	\$1,059,900,000
Retail sales	\$571,640,000
Restaurant, Bar	\$569,530,000
Hotel, Motel	\$328,220,000
Groceries, Snacks	\$228,620,000
Outfitter, Guide	\$72,950,000
Auto Rental	\$64,140,000
Licenses, Entrance Fees	\$61,880,000
Rental cabin, Condo	\$38,480,000
Campground, RV Park	\$20,800,000
Misc. Services	\$13,820,000
Vehicle Repairs	\$10,670,000
Gambling	\$6,420,000
Farmers Market	\$4,870,000
Transp. Fares	\$720,000
TOTAL	\$3,052,660,000

A portion of the total dollar amount per category is allocated to each county, based on the observed spending patterns within the data. The estimates of spending by nonresidents for each of the selected counties and travel regions can be found in the following figures.

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 15 of Montana's counties which had samples large enough to do so (counties in which nonresidents spent approximately \$50 million or more). 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 15 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 21 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 on a county basis, 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, Big Horn, Carbon, Cascade, Custer, Flathead, Gallatin, Glacier, Lewis and Clark, Madison, Missoula, Park, Silver Bow, Stillwater, and Yellowstone. Other counties totaled less than approximately \$50 million in nonresident spending, and were, therefore, not analyzed.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region (in 2012 \$s)

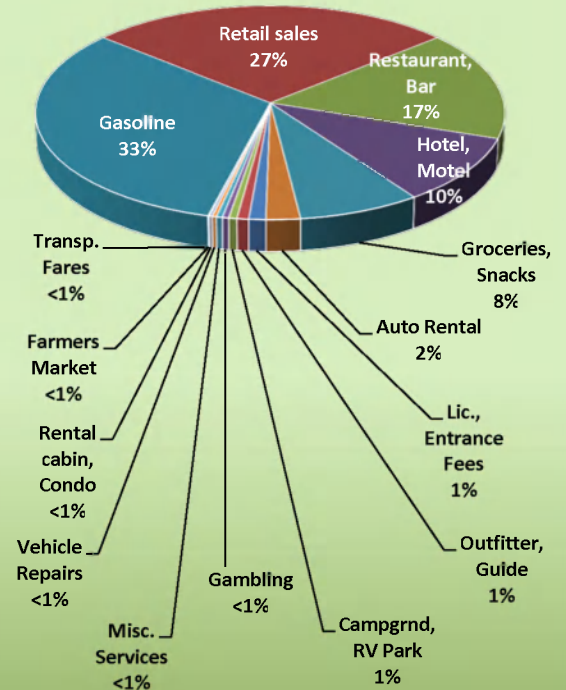
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Central Montana Travel Region



Table 1 - Total Nonresident Spending in Central Montana*⁰

Gasoline	\$111,670,000	Outfitter, Guide	\$2,520,000
Retail sales	\$94,220,000	Campgrnd, RV Park	\$1,770,000
Restaurant, Bar	\$57,290,000	Gambling	\$1,370,000
Hotel, Motel	\$34,550,000	Misc. Services	\$1,320,000
Groceries, Snacks	\$26,700,000	Vehicle Repairs	\$850,000
Auto Rental	\$7,460,000	Rental cabin, Condo	\$730,000
Lic., Entrance Fees	\$3,650,000	Farmers Market	\$200,000
		Transp. Fares	\$50,000
TOTAL		\$344.350,000	

2011-2012 Nonresident Expenditure Percentages in Central Montana Travel Region



2011-2012 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

- 2011-2012 average spending* in Central Montana by nonresident visitors to Montana totaled \$344.4 million.
- This \$344.4 million in local spending directly supports \$246.5 million¹ of economic activity in the region, and supports an additional \$120.4 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$366.9 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$246,490,000 ¹	\$67,440,000 ²	\$52,990,000 ³	\$366,920,000 ⁴
Employment (# of jobs)	2,930	490	460	3,880
Employee Compensation	\$58,570,000	\$14,330,000	\$12,580,000	\$85,480,000
Proprietor Income	\$11,110,000	\$3,800,000	\$3,110,000	\$18,030,000
Other Property Type Income	\$28,910,000	\$10,510,000	\$10,440,000	\$49,870,000
State & Local Taxes	=	=	=	\$27,980,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Glacier Country Travel Region (in 2012 \$s)

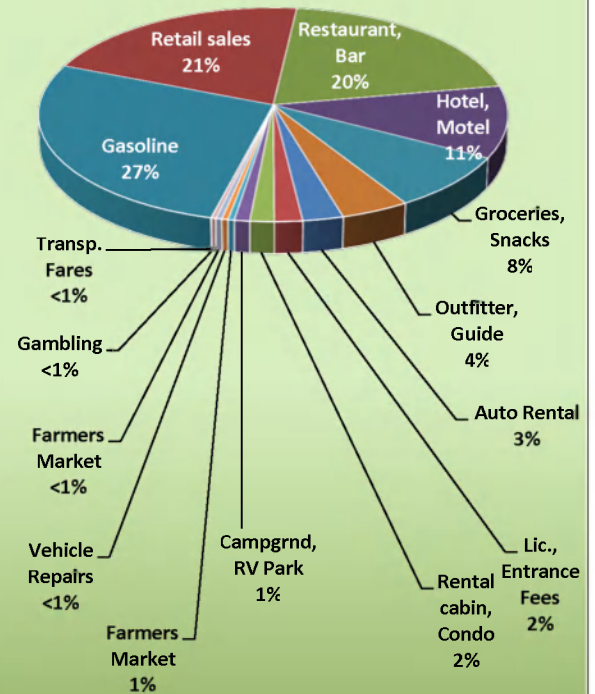
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Glacier Country Travel Region



Table 1 - Total Nonresident Spending in Glacier Country*⁰

Gasoline	\$195,260,000	Lic., Entrance Fees	\$12,580,000
Retail sales	\$146,700,000	Rental cabin/Condo	\$10,930,000
Restaurant, Bar	\$145,370,000	Campgrnd, RV Park	\$6,880,000
Hotel, Motel	\$77,620,000	Farmers Market	\$2,810,000
Groceries, Snacks	\$59,360,000	Vehicle Repairs	\$2,780,000
Outfitter, Guide	\$30,880,000	Gambling	\$2,760,000
Auto Rental	\$18,320,000	Misc. Services	\$1,980,000
		Transportation Fares	\$200,000
TOTAL			\$714,420,000

2011-2012 Nonresident Expenditure Percentages in Glacier Country Travel Region



2011-2012 Contribution of Nonresident Traveler Expenditures in Glacier Country Travel Region

- 2011-2012 average spending* in Glacier Country by nonresident visitors to Montana totaled \$714.4 million.
- This \$714.4 million in local spending directly supports \$471.9 million¹ of economic activity in the region, and supports an additional \$304.8 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$776.7 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$471,890,000 ¹	\$147,350,000 ²	\$157,460,000 ³	\$776,700,000 ⁴
Employment (# of jobs)	6,580	1,410	1,510	9,500
Employee Compensation	\$141,360,000	\$34,050,000	\$39,890,000	\$215,300,000
Proprietor Income	\$26,300,000	\$9,740,000	\$9,110,000	\$45,150,000
Other Property Type Income	\$52,790,000	\$27,300,000	\$32,550,000	\$112,650,000
State & Local Taxes	=	=	=	\$61,540,000

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.

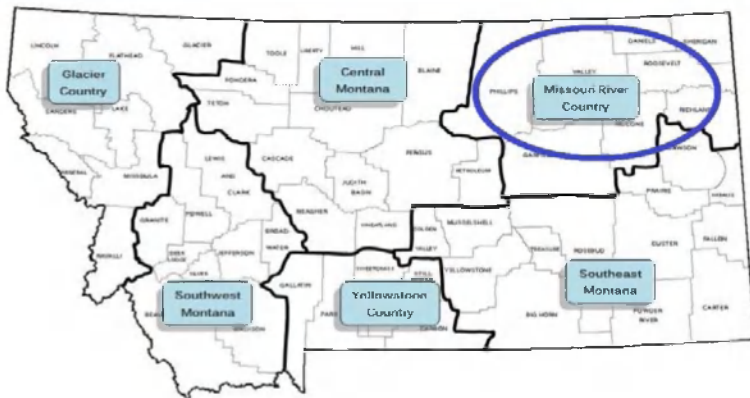
Industry Output is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

*Data is collected at the state level. The two-year average of expenditures (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Missouri River Country Travel Region (in 2012 \$s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Missouri River Country Travel Region



2011-2012 Nonresident Expenditure Percentages in Missouri River Country Travel Region

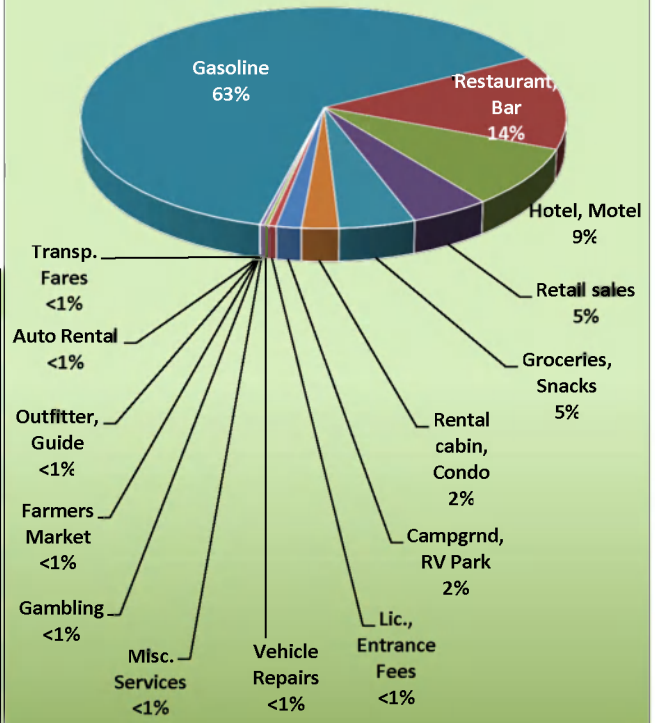


Table 1 - Total Nonresident Spending in Missouri River Country^{*,†}

Gasoline	\$40,400,000	Lic., Entrance Fees	\$300,000
Restaurant, Bar	\$8,900,000	Vehicle Repairs	\$170,000
Hotel, Motel	\$5,490,000	Misc. Services	\$150,000
Retail sales	\$3,090,000	Gambling	\$30,000
Groceries, Snacks	\$2,980,000	Farmers Market	Insufficient Sample Size
Rental cabin/Condo	\$1,430,000	Outfitter, Guide	Insufficient Sample Size
Campgrnd, RV Park	\$970,000	Auto Rental	Insufficient Sample Size
		Transportation Fares	Insufficient Sample Size
TOTAL		\$63.910.000	

2011-2012 Contribution of Nonresident Traveler Expenditures in Missouri River Country Travel Region

- 2011-2012 average spending^{*} in Missouri River Country by nonresident visitors to Montana totaled \$63.9 million.
- This million in local spending directly supports \$37.7 million¹ of economic activity in the region, and supports an additional \$12.3 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$50.0 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$37,750,000 ¹	\$6,790,000 ²	\$5,490,000 ³	\$50,030,000 ⁴
Employment (# of jobs)	500	60	50	610
Employee Compensation	\$9,970,000	\$1,660,000	\$1,220,000	\$12,850,000
Proprietor Income	\$2,010,000	\$340,000	\$240,000	\$2,590,000
Other Property Type Income	\$4,860,000	\$1,090,000	\$1,210,000	\$7,150,000
State & Local Taxes	—	—	—	\$5,060,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Southeast Montana Travel Region (in 2012 \$s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Southeast Montana Travel Region

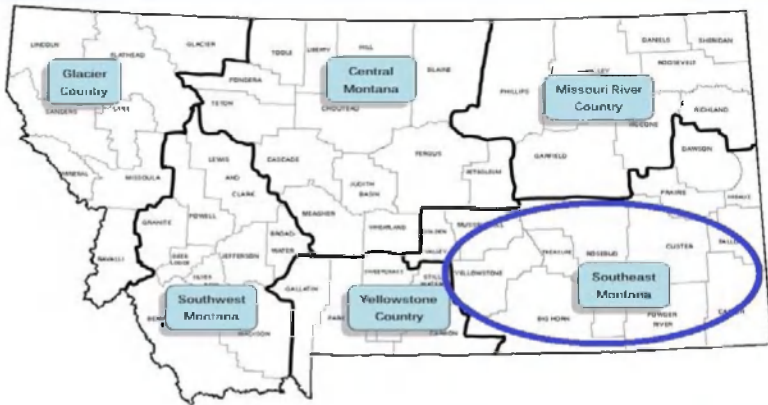
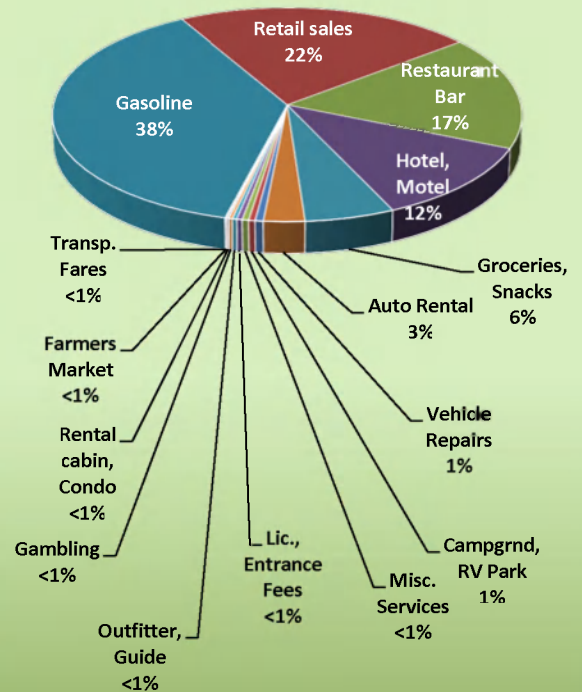


Table 1 - Total Nonresident Spending in Southeast Montana*⁰

Gasoline	\$234,350,000	Campgrnd, RV Park	\$2,490,000
Retail sales	\$137,710,000	Misc. Services	\$2,490,000
Restaurant, Bar	\$106,500,000	Lic., Entrance Fees	\$2,150,000
Hotel, Motel	\$72,150,000	Outfitter, Guide	\$1,730,000
Groceries, Snacks	\$35,040,000	Gambling	\$1,260,000
Auto Rental	\$15,950,000	Rental cabin/Condo	\$810,000
Vehicle Repairs	\$3,150,000	Farmers Market	\$660,000
		Transportation Fares	\$140,000
TOTAL		\$616.580.000	

2011-2012 Nonresident Expenditure Percentages in Southeast Montana Travel Region



2011-2012 Contribution of Nonresident Traveler Expenditures in Southeast Montana Travel Region

- 2011-2012 average spending* in Southeast Montana by nonresident visitors to Montana totaled \$616.6 million.
- This \$616.6 million in local spending directly supports \$496.3 million¹ of economic activity in the region, and supports an additional \$265.7 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$762.0 million.⁴

Table 2 - 2011-2012 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$496,310,000 ¹	\$146,360,000 ²	\$119,340,000 ³	\$762,010,000 ⁴
Employment (# of jobs)	5,370	1,110	1,050	7,530
Employee Compensation	\$128,360,000	\$35,030,000	\$33,330,000	\$196,720,000
Proprietor Income	\$13,500,000	\$5,580,000	\$4,670,000	\$23,750,000
Other Property Type Income	\$63,630,000	\$23,320,000	\$23,540,000	\$110,490,000
State & Local Taxes	=	=	=	\$54,270,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Southwest Montana Travel Region (in 2012 \$s)

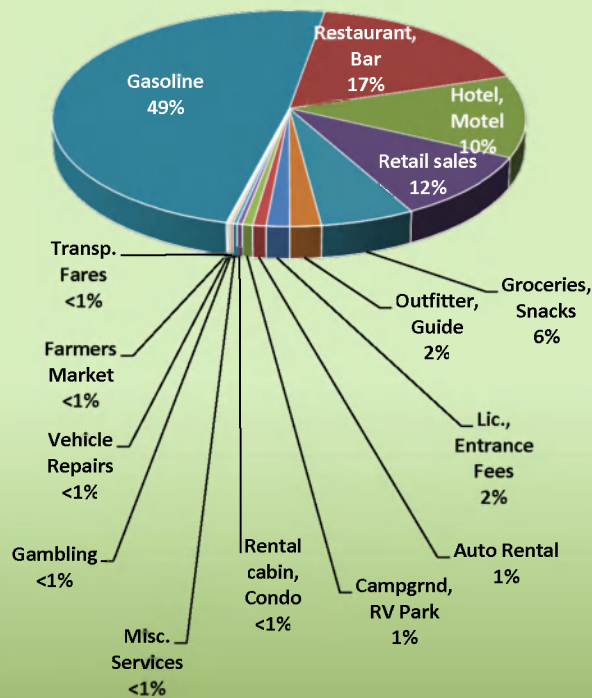
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Southwest Montana Travel Region



Table 1 - Total Nonresident Spending in Southwest Montana^{*,0}

Gasoline	\$191,980,000	Auto Rental	\$3,260,000
Restaurant, Bar	\$68,460,000	Campgrnd, RV Park	\$2,540,000
Retail sales	\$48,390,000	Rental cabin/Condo	\$1,280,000
Hotel, Motel	\$38,830,000	Misc. Services	\$1,100,000
Groceries, Snacks	\$23,170,000	Gambling	\$650,000
Outfitter, Guide	\$7,720,000	Vehicle Repairs	\$480,000
Lic., Entrance Fees	\$5,670,000	Farmers Market	\$390,000
		Transportation Fares	\$40,000
TOTAL		\$393,970,000	

2011-2012 Nonresident Expenditure Percentages in Southwest Montana Travel Region



2011-2012 Contribution of Nonresident Traveler Expenditures in Southwest Montana Travel Region

- 2011-2012 average spending^{*} in Southwest Montana by nonresident visitors to Montana totaled \$394.0 million.
- This \$394.0 million in local spending directly supports \$231.8 million¹ of economic activity in the region, and supports an additional \$116.1 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$347.9 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$231,750,000 ¹	\$58,590,000 ²	\$57,540,000 ³	\$347,870,000 ⁴
Employment (# of jobs)	3,070	510	530	4,100
Employee Compensation	\$67,040,000	\$14,170,000	\$14,550,000	\$95,770,000
Proprietor Income	\$19,480,000	\$3,560,000	\$3,170,000	\$26,210,000
Other Property Type Income	\$26,450,000	\$11,110,000	\$12,250,000	\$49,810,000
State & Local Taxes	=	=	=	\$28,160,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone Country Travel Region (in 2012 \$s)

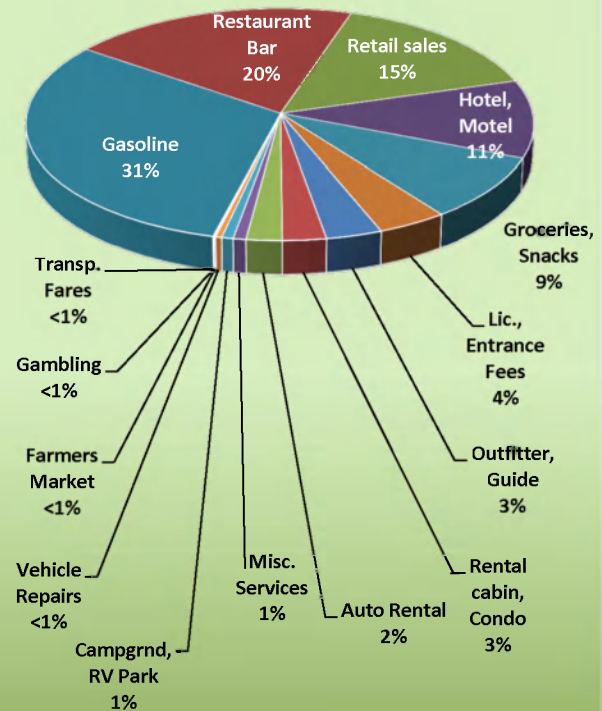
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Yellowstone Country Travel Region



Table 1 - Total Nonresident Spending in Yellowstone Country*

Gasoline	\$286,240,000	Rental cabin/Condo	\$23,310,000
Restaurant, Bar	\$183,010,000	Auto Rental	\$19,140,000
Retail sales	\$141,530,000	Misc. Services	\$6,770,000
Hotel, Motel	\$99,580,000	Campgrnd, RV Park	\$6,150,000
Groceries, Snacks	\$81,370,000	Vehicle Repairs	\$3,240,000
Lic., Entrance Fees	\$37,540,000	Farmers Market	\$810,000
Outfitter, Guide	\$30,100,000	Gambling	\$350,000
		Transportation Fares	\$290,000
TOTAL		\$919,430,000	

2011-2012 Nonresident Expenditure Percentages in Yellowstone Country Travel Region



2011-2012 Contribution of Nonresident Traveler Expenditures in Yellowstone Country Travel Region

- 2011-2012 average spending* in Yellowstone Country by nonresident visitors to Montana totaled \$919.4 million.
- This \$919.4 million in local spending directly supports \$627.4 million¹ of economic activity in the region, and supports an additional \$360.8 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$988.2 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$627,410,000 ¹	\$182,000,000 ²	\$178,780,000 ³	\$988,190,000 ⁴
Employment (# of jobs)	8,400	1,710	1,690	11,800
Employee Compensation	\$202,080,000	\$41,380,000	\$43,110,000	\$286,570,000
Proprietor Income	\$28,680,000	\$11,870,000	\$10,280,000	\$50,830,000
Other Property Type Income	\$69,780,000	\$35,390,000	\$39,350,000	\$144,530,000
State & Local Taxes	=	=	=	\$78,770,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Beaverhead County (in 2012 \$s)

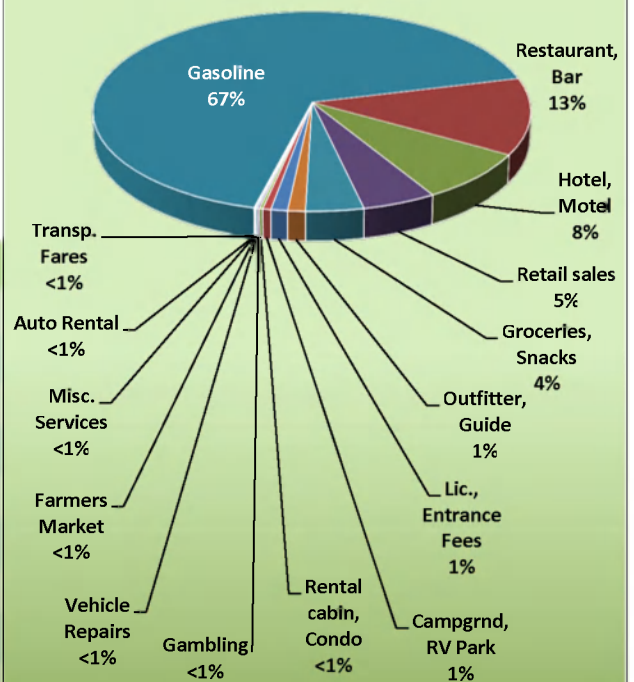
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Beaverhead County



Table 1 - Total Nonresident Spending in Beaverhead County*⁰

Gasoline	\$75,910,000	Campgrnd, RV Park	\$620,000
Restaurant, Bar	\$14,060,000	Rental cabin, Condo	\$250,000
Hotel, Motel	\$9,100,000	Gambling	\$170,000
Retail sales	\$5,670,000	Vehicle Repairs	\$130,000
Groceries, Snacks	\$4,430,000	Farmers Market	\$60,000
Outfitter, Guide	\$1,340,000	Misc. Services	\$60,000
Lic., Entrance Fees	\$1,270,000	Auto Rental	Insufficient Sample Size
		Transp. Fares	Insufficient Sample Size
TOTAL		\$113,070,000	

2011-2012 Nonresident Expenditure Percentages in Beaverhead County



2011-2012 Contribution of Nonresident Traveler Expenditures in Beaverhead County

- 2011-2012 average spending* in Beaverhead County by nonresident visitors to Montana totaled \$113.1 million.
- This \$113.1 million in local spending directly supports \$52.5 million¹ of economic activity in the region, and supports an additional \$17.4 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$69.9 million.⁴

Table 2 - 2011-2012 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$52,490,000 ¹	\$9,430,000 ²	\$8,000,000 ³	\$69,930,000 ⁴
Employment (# of jobs)	790	100	80	980
Employee Compensation	\$12,740,000	\$1,520,000	\$1,550,000	\$15,810,000
Proprietor Income	\$1,620,000	\$650,000	\$410,000	\$2,690,000
Other Property Type Income	\$7,970,000	\$2,170,000	\$1,900,000	\$12,040,000
State & Local Taxes	—	—	—	\$6,860,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Big Horn County (in 2012 \$s)

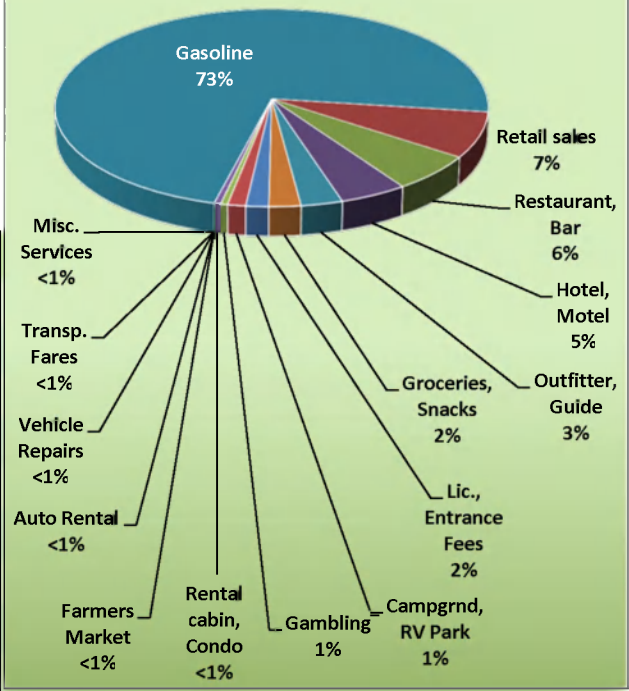
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Big Horn County



Table 1 - Total Nonresident Spending in Big Horn County*^o

Gasoline	\$34,390,000	Campgrnd, RV Park	\$580,000
Retail sales	\$3,500,000	Gambling	\$220,000
Restaurant, Bar	\$2,800,000	Rental cabin, Condo	\$210,000
Hotel, Motel	\$2,180,000	Farmers Market	Insufficient Sample Size
Outfitter, Guide	\$1,340,000	Auto Rental	Insufficient Sample Size
Groceries, Snacks	\$1,020,000	Vehicle Repairs	Insufficient Sample Size
Lic., Entrance Fees	\$730,000	Transp. Fares	Insufficient Sample Size
		Misc. Services	Insufficient Sample Size
TOTAL		\$46.960,000	

2011-2012 Nonresident Expenditure Percentages in Big Horn County



2011-2012 Contribution of Nonresident Traveler Expenditures in Big Horn County

- 2011-2012 average spending^{*} in Big Horn County by nonresident visitors to Montana totaled \$47.0 million.
- This \$47.0 million in local spending directly supports \$18.4 million¹ of economic activity in the region, and supports an additional \$1.8 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$22.2 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$18,400,000 ¹	\$2,150,000 ²	\$1,640,000 ³	\$22,200,000 ⁴
Employment (# of jobs)	260	20	15	295
Employee Compensation	\$4,860,000	\$380,000	\$330,000	\$5,570,000
Proprietor Income	\$980,000	\$90,000	\$50,000	\$1,120,000
Other Property Type Income	\$2,980,000	\$490,000	\$450,000	\$3,920,000
State & Local Taxes	—	—	—	\$2,260,000

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 (2012 \$s) was used to help account for small and varying sample sizes at the county level.

^oExpenditure category totals may not add to overall total due to rounding.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Carbon County (in 2012 \$s)

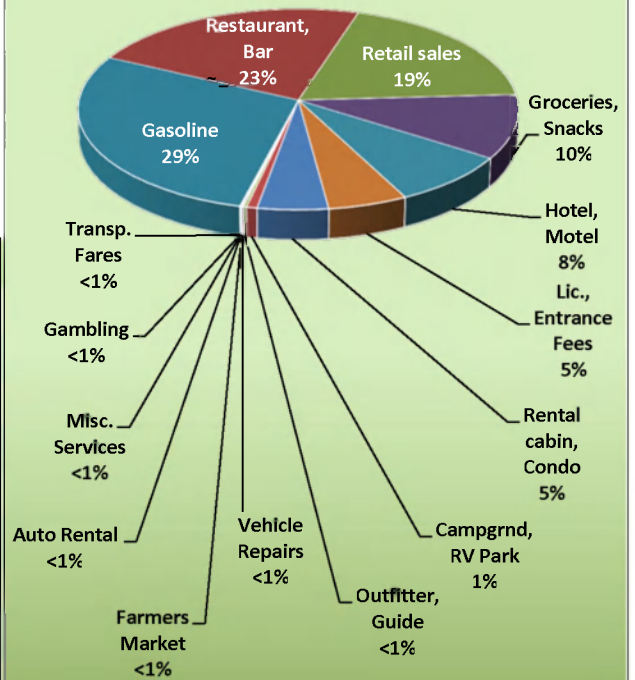
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Carbon County



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

Gasoline	\$26,340,000	Campgrnd, RV Park	\$650,000
Restaurant, Bar	\$20,820,000	Outfitter, Guide	\$190,000
Retail sales	\$17,910,000	Vehicle Repairs	\$110,000
Groceries, Snacks	\$9,500,000	Farmers Market	\$40,000
Hotel, Motel	\$7,660,000	Auto Rental	\$40,000
Lic., Entrance Fees	\$4,960,000	Misc. Services	\$30,000
Rental cabin, Condo	\$4,400,000	Gambling	\$10,000
		Transp. Fares	<i>Insufficient Sample Size</i>
TOTAL		\$92.660,000	

2011-2012 Nonresident Expenditure Percentages in Carbon County



2011-2012 Contribution of Nonresident Traveler Expenditures in Carbon County

- 2011-2012 average spending^{*} in Carbon County by nonresident visitors to Montana totaled \$92.7 million.
- This \$92.7 million in local spending directly supports \$56.3 million¹ of economic activity in the region, and supports an additional \$21.7 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$78.0 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$56,340,000 ¹	\$12,150,000 ²	\$9,520,000 ³	\$78,020,000 ⁴
Employment (# of jobs)	840	130	90	1,060
Employee Compensation	\$16,150,000	\$2,130,000	\$1,600,000	\$19,880,000
Proprietor Income	\$3,630,000	\$950,000	\$570,000	\$5,150,000
Other Property Type Income	\$6,210,000	\$2,640,000	\$2,550,000	\$11,400,000
State & Local Taxes	=	=	=	\$6,770,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Cascade County (in 2012 \$s)

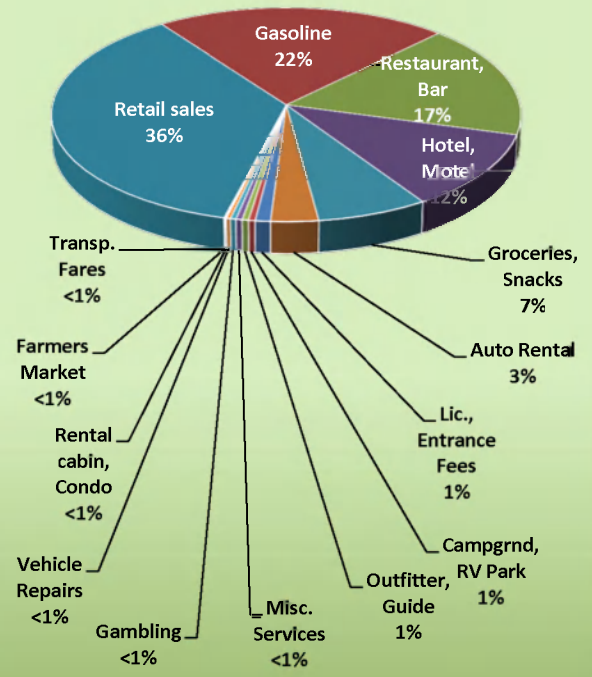
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Cascade County



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

Retail sales	\$83,760,000	Campgrnd, RV Park	\$960,000
Gasoline	\$50,520,000	Outfitter, Guide	\$930,000
Restaurant, Bar	\$39,710,000	Misc. Services	\$880,000
Hotel, Motel	\$26,450,000	Gambling	\$810,000
Groceries, Snacks	\$16,180,000	Vehicle Repairs	\$580,000
Auto Rental	\$6,910,000	Rental cabin, Condo	\$230,000
Lic., Entrance Fees	\$2,190,000	Farmers Market	\$90,000
		Transp. Fares	\$50,000
TOTAL		\$230,270,000	

2011-2012 Nonresident Expenditure Percentages in Cascade County



2011-2012 Contribution of Nonresident Traveler Expenditures in Cascade County

- 2011-2012 average spending^{*} in Cascade County by nonresident visitors to Montana totaled \$230.3 million.
- This \$230.3 million in local spending directly supports \$168.5 million¹ of economic activity in the region, and supports an additional \$91.4 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$259.8 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$168,460,000 ¹	\$46,110,000 ²	\$45,250,000 ³	\$259,830,000 ⁴
Employment (# of jobs)	2,050	360	390	2,800
Employee Compensation	\$49,540,000	\$11,200,000	\$11,530,000	\$72,270,000
Proprietor Income	\$7,240,000	\$2,990,000	\$2,770,000	\$13,000,000
Other Property Type Income	\$18,370,000	\$6,780,000	\$8,570,000	\$33,720,000
State & Local Taxes	=	=	=	\$18,640,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Custer County (in 2012 \$s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Custer County



2011-2012 Nonresident Expenditure Percentages in Custer County

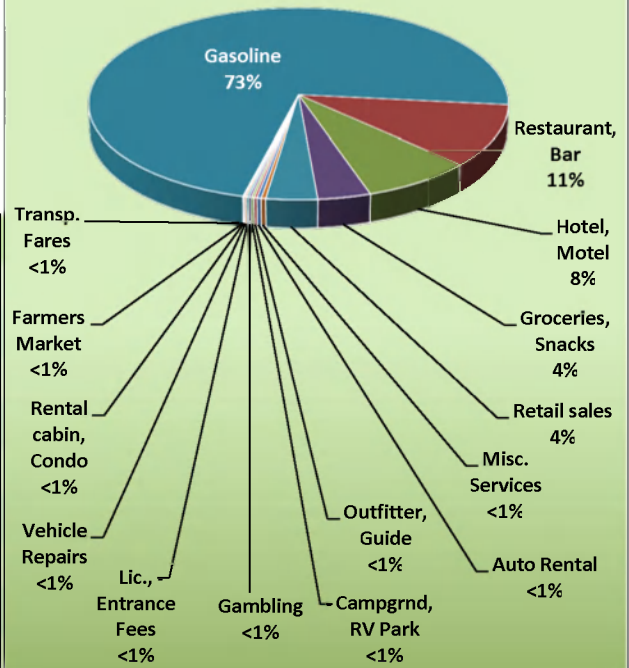


Table 1 - Total Nonresident Spending in Custer*⁰

Gasoline	\$54,450,000	Outfitter, Guide	\$150,000
Restaurant, Bar	\$7,810,000	Campgrnd, RV Park	\$140,000
Hotel, Motel	\$5,860,000	Gambling	\$140,000
Groceries, Snacks	\$2,800,000	Lic., Entrance Fees	\$120,000
Retail sales	\$2,700,000	Vehicle Repairs	\$100,000
Misc. Services	\$240,000	Rental cabin, Condo	\$80,000
Auto Rental	\$220,000	Farmers Market	\$20,000
		Transp. Fares	Insufficient Sample Size
TOTAL		\$74,840,000	

2011-2012 Contribution of Nonresident Traveler Expenditures in Custer County

- 2011-2012 average spending* in Custer County by nonresident visitors to Montana totaled \$74.8 million.
- This \$74.8 million in local spending directly supports \$40.3 million¹ of economic activity in the region, and supports an additional \$17.0 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$57.3 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$40,320,000 ¹	\$8,590,000 ²	\$8,390,000 ³	\$57,310,000 ⁴
Employment (# of jobs)	530	90	80	700
Employee Compensation	\$11,050,000	\$2,150,000	\$2,180,000	\$15,390,000
Proprietor Income	\$740,000	\$600,000	\$360,000	\$1,700,000
Other Property Type Income	\$6,270,000	\$1,350,000	\$1,770,000	\$9,400,000
State & Local Taxes	—	—	—	\$5,780,000

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 (2012 \$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.

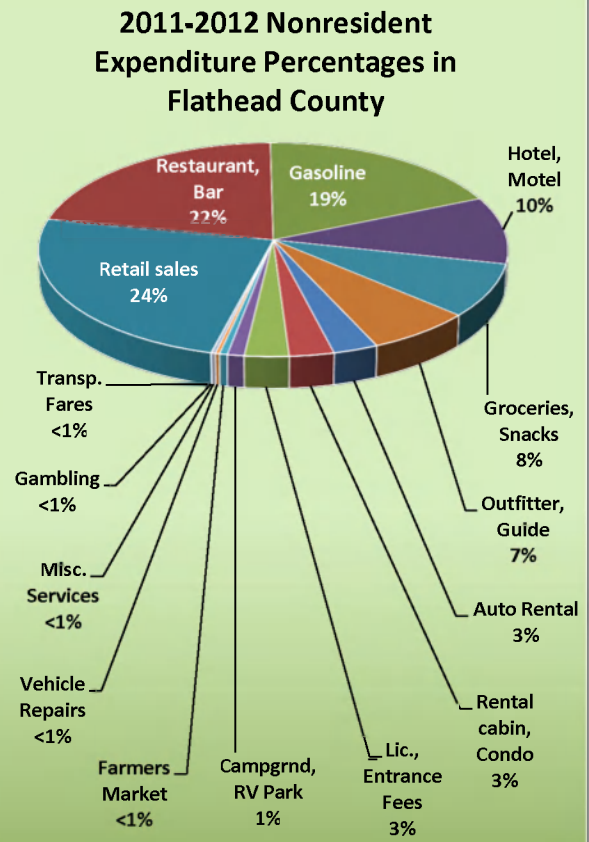
2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Flathead County (in 2012 \$s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Flathead County



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

Retail sales	\$70,540,000	Rental cabin, Condo	\$8,190,000
Restaurant, Bar	\$62,730,000	Lic., Entrance Fees	\$8,110,000
Gasoline	\$54,060,000	Campgrnd, RV Park	\$3,060,000
Hotel, Motel	\$29,590,000	Farmers Market	\$1,450,000
Groceries, Snacks	\$23,350,000	Vehicle Repairs	\$740,000
Outfitter, Guide	\$19,520,000	Misc. Services	\$730,000
Auto Rental	\$8,230,000	Gambling	\$100,000
		Transp. Fares	<i>Insufficient Sample Size</i>
TOTAL		\$290,400,000	



2011-2012 Contribution of Nonresident Traveler Expenditures in Flathead County

- 2011-2012 average spending^{*} in Flathead County by nonresident visitors to Montana totaled \$290.4 million.
- This \$290.4 million in local spending directly supports \$195.1 million¹ of economic activity in the region, and supports an additional \$123.2 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$318.3 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$195,050,000 ¹	\$59,550,000 ²	\$63,670,000 ³	\$318,260,000 ⁴
Employment (# of jobs)	2,780	590	600	3,970
Employee Compensation	\$63,090,000	\$12,980,000	\$15,950,000	\$92,020,000
Proprietor Income	\$9,130,000	\$4,890,000	\$4,230,000	\$18,250,000
Other Property Type Income	\$21,060,000	\$11,960,000	\$13,590,000	\$46,610,000
State & Local Taxes	=	=	=	\$24,720,000

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 (2012 \$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.

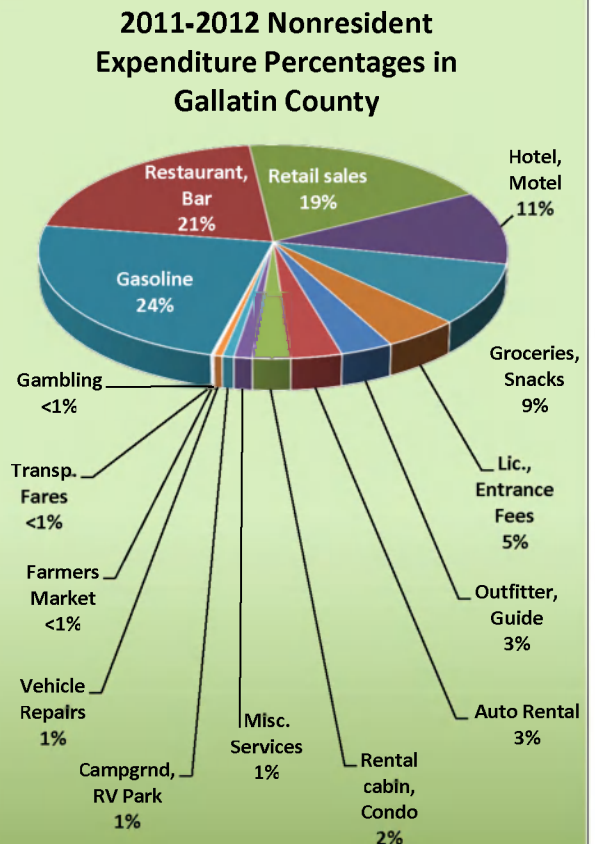
2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Gallatin County (in 2012 \$s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Gallatin County



Table 1 - Total Nonresident Spending in Gallatin County*[†]

Gasoline	\$131,750,000	Auto Rental	\$18,070,000
Restaurant, Bar	\$115,950,000	Rental cabin, Condo	\$13,320,000
Retail sales	\$105,900,000	Misc. Services	\$6,420,000
Hotel, Motel	\$62,300,000	Campgrnd, RV Park	\$4,040,000
Groceries, Snacks	\$51,480,000	Vehicle Repairs	\$2,930,000
Lic., Entrance Fees	\$26,950,000	Farmers Market	\$600,000
Outfitter, Guide	\$18,610,000	Transp. Fares	\$280,000
		Gambling	\$200,000
		TOTAL	\$558,800,000



2011-2012 Contribution of Nonresident Traveler Expenditures in Gallatin County

- 2011-2012 average spending^{*} in Gallatin County by nonresident visitors to Montana totaled \$558.8 million.
- This \$558.8 million in local spending directly supports \$335.3 million¹ of economic activity in the region, and supports an additional \$205.9 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$541.2 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$335,320,000 ¹	\$100,800,000 ²	\$105,090,000 ³	\$541,210,000 ⁴
Employment (# of jobs)	4,640	940	990	6,560
Employee Compensation	\$113,000,000	\$23,920,000	\$27,000,000	\$163,920,000
Proprietor Income	\$15,190,000	\$6,430,000	\$6,070,000	\$27,680,000
Other Property Type Income	\$31,370,000	\$19,240,000	\$22,500,000	\$73,100,000
State & Local Taxes	=	=	=	\$39,040,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Glacier County (in 2012 \$s)

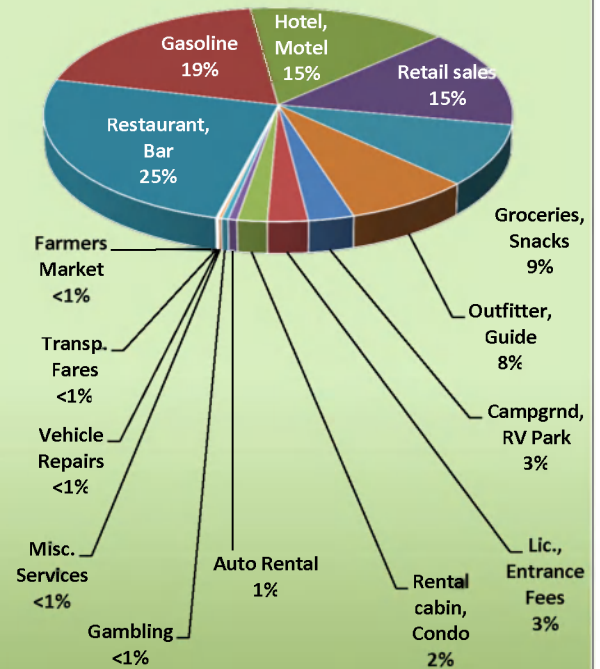
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Glacier County



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

Restaurant, Bar	\$18,880,000	Lic., Entrance Fees	\$1,930,000
Gasoline	\$14,370,000	Rental cabin, Condo	\$1,420,000
Hotel, Motel	\$11,420,000	Auto Rental	\$420,000
Retail sales	\$11,300,000	Gambling	\$320,000
Groceries, Snacks	\$7,020,000	Misc. Services	\$140,000
Outfitter, Guide	\$6,010,000	Vehicle Repairs	\$60,000
Campgrnd, RV Park	\$2,180,000	Transp. Fares	\$40,000
		Farmers Market	\$30,000
TOTAL		\$75.530,000	

2011-2012 Nonresident Expenditure Percentages in Glacier County



2011-2012 Contribution of Nonresident Traveler Expenditures in Glacier County

- 2011-2012 average spending^{*} in Glacier County by nonresident visitors to Montana totaled \$75.5 million.
- This \$75.5 million in local spending directly supports \$52.1 million¹ of economic activity in the region, and supports an additional \$12.9 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$65.0 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$52,100,000 ¹	\$6,960,000 ²	\$5,920,000 ³	\$64,980,000 ⁴
Employment (# of jobs)	770	70	60	900
Employee Compensation	\$17,910,000	\$1,380,000	\$1,240,000	\$20,530,000
Proprietor Income	\$1,460,000	\$380,000	\$280,000	\$2,120,000
Other Property Type Income	\$5,610,000	\$1,450,000	\$1,480,000	\$8,530,000
State & Local Taxes	—	—	—	\$5,470,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Lewis and Clark County (in 2012 \$s)

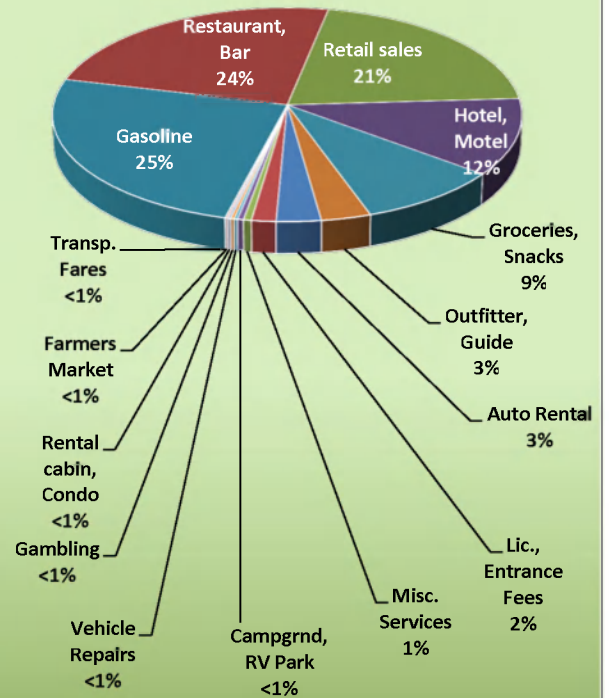
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Lewis and Clark



Table 1 - Total Nonresident Spending in Lewis and Clark County^{*,†}

Gasoline	\$22,680,000	Lic., Entrance Fees	\$1,390,000
Restaurant, Bar	\$21,860,000	Misc. Services	\$450,000
Retail sales	\$18,980,000	Campgrnd, RV Park	\$340,000
Hotel, Motel	\$10,430,000	Vehicle Repairs	\$190,000
Groceries, Snacks	\$8,300,000	Gambling	\$190,000
Outfitter, Guide	\$2,850,000	Rental cabin, Condo	\$170,000
Auto Rental	\$2,550,000	Farmers Market	\$150,000
		Transp. Fares	\$20,000
TOTAL		\$90,550,000	

2011-2012 Nonresident Expenditure Percentages in Lewis and Clark County



2011-2012 Contribution of Nonresident Traveler Expenditures in Lewis and Clark County

- 2011-2012 average spending^{*} in Lewis and Clark County by nonresident visitors to Montana totaled \$90.6 million.
- This \$90.6 million in local spending directly supports \$59.8 million¹ of economic activity in the region, and supports an additional \$28.9 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$88.7 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$59,790,000 ¹	\$16,350,000 ²	\$12,540,000 ³	\$88,670,000 ⁴
Employment (# of jobs)	880	150	110	1,140
Employee Compensation	\$18,520,000	\$4,510,000	\$3,530,000	\$26,550,000
Proprietor Income	\$2,850,000	\$900,000	\$580,000	\$4,330,000
Other Property Type Income	\$6,260,000	\$2,980,000	\$2,670,000	\$11,910,000
State & Local Taxes	=	=	=	\$6,890,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Madison County (in 2012 \$s)

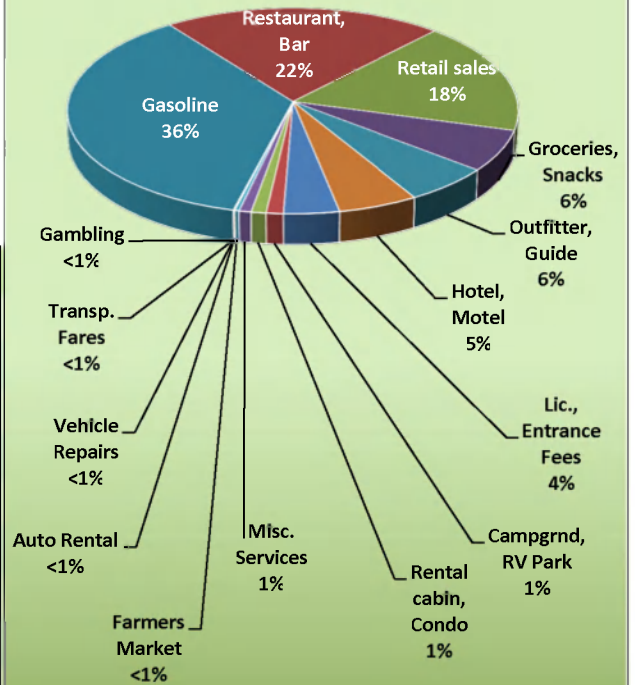
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Madison County



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

Gasoline	\$17,710,000	Campgrnd, RV Park	\$550,000
Restaurant, Bar	\$10,700,000	Rental cabin, Condo	\$480,000
Retail sales	\$8,690,000	Misc. Services	\$390,000
Groceries, Snacks	\$3,160,000	Farmers Market	\$140,000
Outfitter, Guide	\$2,830,000	Auto Rental	\$50,000
Hotel, Motel	\$2,600,000	Vehicle Repairs	Insufficient Sample Size
Lic., Entrance Fees	\$1,790,000	Transp. Fares	Insufficient Sample Size
		Gambling	Insufficient Sample Size
TOTAL		\$49,100,000	

2011-2012 Nonresident Expenditure Percentages in Madison County



2011-2012 Contribution of Nonresident Traveler Expenditures in Madison County

- 2011-2012 average spending^{*} in Madison County by nonresident visitors to Montana totaled \$49.1 million.
- This \$49.1 million in local spending directly supports \$29.2 million¹ of economic activity in the region, and supports an additional \$9.8 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$38.9 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$29,160,000 ¹	\$4,480,000 ²	\$5,290,000 ³	\$38,930,000 ⁴
Employment (# of jobs)	390	45	45	480
Employee Compensation	\$10,970,000	\$900,000	\$1,070,000	\$12,940,000
Proprietor Income	\$1,820,000	\$190,000	\$230,000	\$2,240,000
Other Property Type Income	\$2,910,000	\$1,100,000	\$1,430,000	\$5,440,000
State & Local Taxes	—	—	—	\$2,990,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Missoula County (in 2012 \$s)

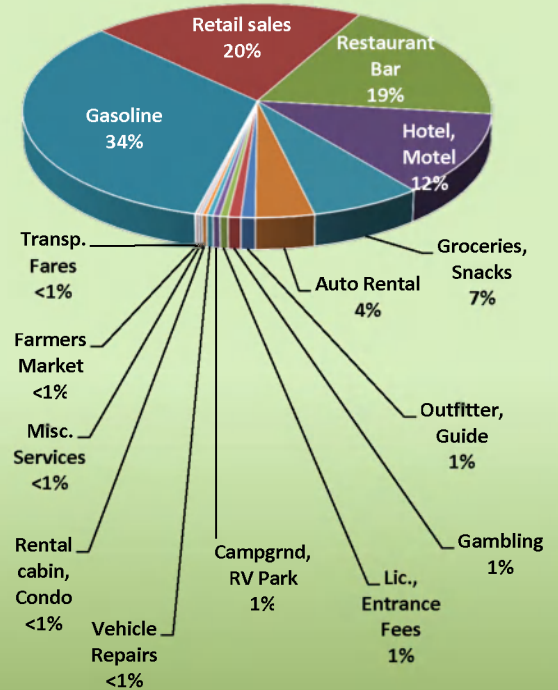
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Missoula County



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

Gasoline	\$86,780,000	Gambling	\$2,050,000
Retail sales	\$52,840,000	Lic., Entrance Fees	\$1,320,000
Restaurant, Bar	\$49,400,000	Campgrnd, RV Park	\$1,120,000
Hotel, Motel	\$32,100,000	Vehicle Repairs	\$1,010,000
Groceries, Snacks	\$18,280,000	Rental cabin, Condo	\$790,000
Auto Rental	\$9,630,000	Misc. Services	\$520,000
Outfitter, Guide	\$2,300,000	Farmers Market	\$490,000
		Transp. Fares	\$160,000
TOTAL		\$258,790,000	

2011-2012 Nonresident Expenditure Percentages in Missoula County



2011-2012 Contribution of Nonresident Traveler Expenditures in Missoula County

- 2011-2012 average spending^{*} in Missoula County by nonresident visitors to Montana totaled \$258.8 million.
- This \$258.8 million in local spending directly supports \$166.7 million¹ of economic activity in the region, and supports an additional \$113.1 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$279.8 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$166,710,000 ¹	\$54,630,000 ²	\$58,480,000 ³	\$279,820,000 ⁴
Employment (# of jobs)	2,180	520	560	3,260
Employee Compensation	\$49,410,000	\$14,790,000	\$16,090,000	\$80,300,000
Proprietor Income	\$9,760,000	\$2,990,000	\$3,180,000	\$15,930,000
Other Property Type Income	\$18,660,000	\$9,880,000	\$11,800,000	\$40,340,000
State & Local Taxes	=	=	=	\$22,240,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Park County (in 2012 \$s)

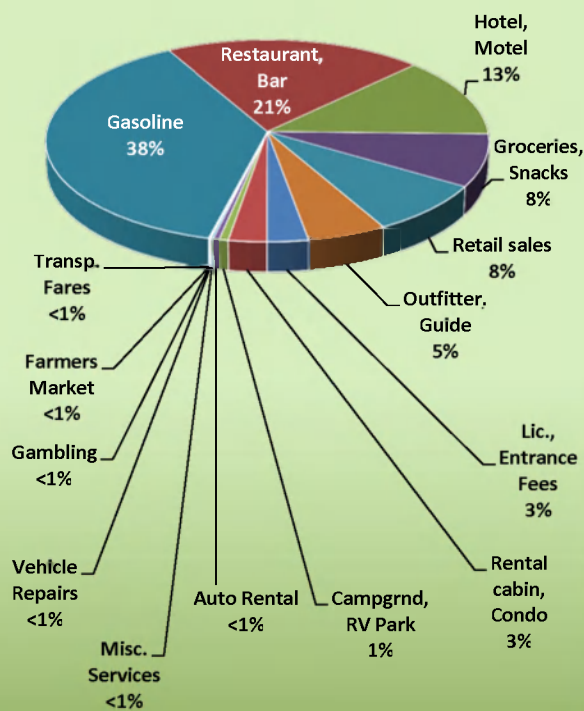
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Park County



Table 1 - Total Nonresident Spending in Park*⁰

Gasoline	\$76,980,000	Rental cabin, Condo	\$5,150,000
Restaurant, Bar	\$41,470,000	Campgrnd, RV Park	\$1,220,000
Hotel, Motel	\$26,010,000	Auto Rental	\$810,000
Groceries, Snacks	\$17,000,000	Misc. Services	\$320,000
Retail sales	\$16,560,000	Vehicle Repairs	\$130,000
Outfitter, Guide	\$10,730,000	Gambling	\$130,000
Lic., Entrance Fees	\$5,550,000	Farmers Market	\$50,000
		Transp. Fares	\$10,000
TOTAL		\$202,120,000	

2011-2012 Nonresident Expenditure Percentages in Park County



2011-2012 Contribution of Nonresident Traveler Expenditures in Park County

- 2011-2012 average spending* in Park County by nonresident visitors to Montana totaled \$202.1 million.
- This \$202.1 million in local spending directly supports \$118.2 million¹ of economic activity in the region, and supports an additional \$47.7 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$165.9 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$118,180,000 ¹	\$25,670,000 ²	\$22,060,000 ³	\$165,920,000 ⁴
Employment (# of jobs)	1,870	290	220	2,380
Employee Compensation	\$34,990,000	\$5,290,000	\$4,750,000	\$45,040,000
Proprietor Income	\$3,630,000	\$1,790,000	\$1,060,000	\$6,490,000
Other Property Type Income	\$14,210,000	\$4,690,000	\$5,150,000	\$24,040,000
State & Local Taxes	=	=	=	\$13,260,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Silver Bow County (in 2012 \$s)

2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Silver Bow County



2011-2012 Nonresident Expenditure Percentages in Silver Bow County

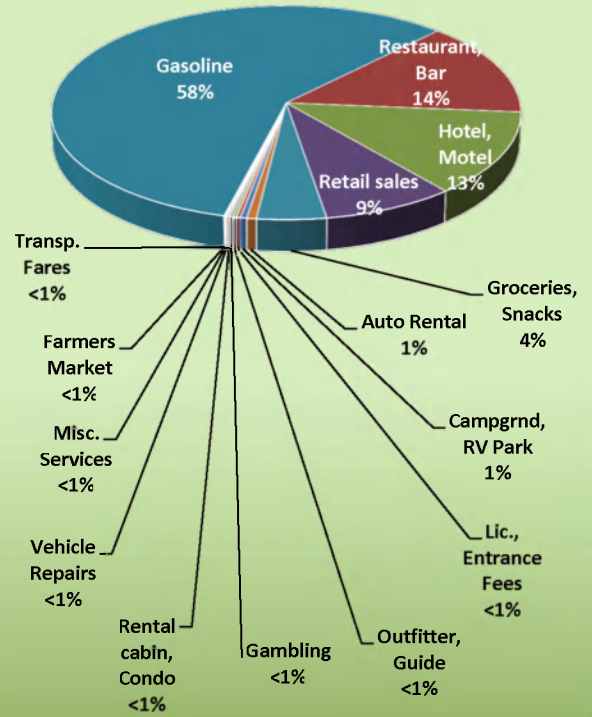


Table 1 - Total Nonresident Spending in Silver Bow County*

Gasoline	\$64,610,000	Lic., Entrance Fees	\$280,000
Restaurant, Bar	\$15,810,000	Outfitter, Guide	\$260,000
Hotel, Motel	\$14,120,000	Gambling	\$190,000
Retail sales	\$9,310,000	Rental cabin, Condo	\$140,000
Groceries, Snacks	\$4,860,000	Vehicle Repairs	\$130,000
Auto Rental	\$660,000	Misc. Services	\$100,000
Campgrnd, RV Park	\$440,000	Farmers Market	\$50,000
		Transp. Fares	\$10,000
TOTAL		\$110,970,000	

2011-2012 Contribution of Nonresident Traveler Expenditures in Silver Bow County

- 2011-2012 average spending* in Silver Bow County by nonresident visitors to Montana totaled \$111.0 million.
- This \$111.0 million in local spending directly supports \$65.4 million¹ of economic activity in the region, and supports an additional \$33.0 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$98.4 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$65,350,000 ¹	\$13,940,000 ²	\$19,080,000 ³	\$98,370,000 ⁴
Employment (# of jobs)	760	110	180	1,050
Employee Compensation	\$16,850,000	\$3,740,000	\$5,020,000	\$25,610,000
Proprietor Income	\$8,670,000	\$930,000	\$1,250,000	\$10,840,000
Other Property Type Income	\$7,460,000	\$2,120,000	\$3,700,000	\$13,280,000
State & Local Taxes	—	—	—	\$7,760,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Stillwater County (In 2012 \$s)

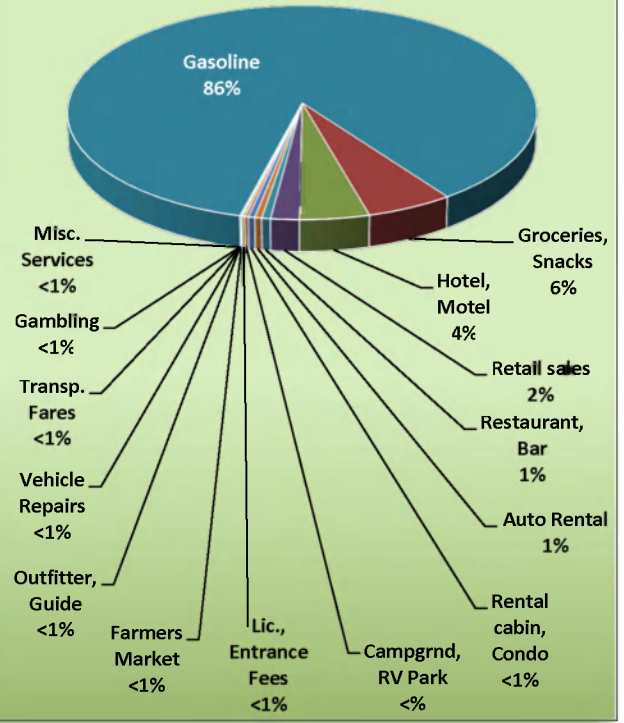
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Stillwater County



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

Gasoline	\$42,040,000	Campgrnd, RV Park	\$100,000
Groceries, Snacks	\$2,680,000	Lic., Entrance Fees	\$90,000
Hotel, Motel	\$2,140,000	Farmers Market	\$50,000
Retail sales	\$870,000	Outfitter, Guide	\$20,000
Restaurant, Bar	\$270,000	Vehicle Repairs	Insufficient Sample Size
Auto Rental	\$210,000	Transp. Fares	Insufficient Sample Size
Rental cabin, Condo	\$200,000	Gambling	Insufficient Sample Size
		Misc. Services	Insufficient Sample Size
TOTAL		\$51.090.000	

2011-2012 Nonresident Expenditure Percentages in Stillwater County



2011-2012 Contribution of Nonresident Traveler Expenditures in Stillwater County

- 2011-2012 average spending^{*} in Stillwater County by nonresident visitors to Montana totaled \$51.1 million.
- This \$51.1 million in local spending directly supports \$17.0 million¹ of economic activity in the region, and supports an additional \$4.0 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$20.9 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$16,980,000 ¹	\$2,260,000 ²	\$1,690,000 ³	\$20,930,000 ⁴
Employment (# of jobs)	240	20	20	280
Employee Compensation	\$4,570,000	\$500,000	\$290,000	\$5,350,000
Proprietor Income	\$420,000	\$120,000	\$80,000	\$630,000
Other Property Type Income	\$2,850,000	\$490,000	\$470,000	\$3,810,000
State & Local Taxes	—	—	—	\$2,230,000

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 (2012 \$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.

2011-2012 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone County (in 2012 \$s)

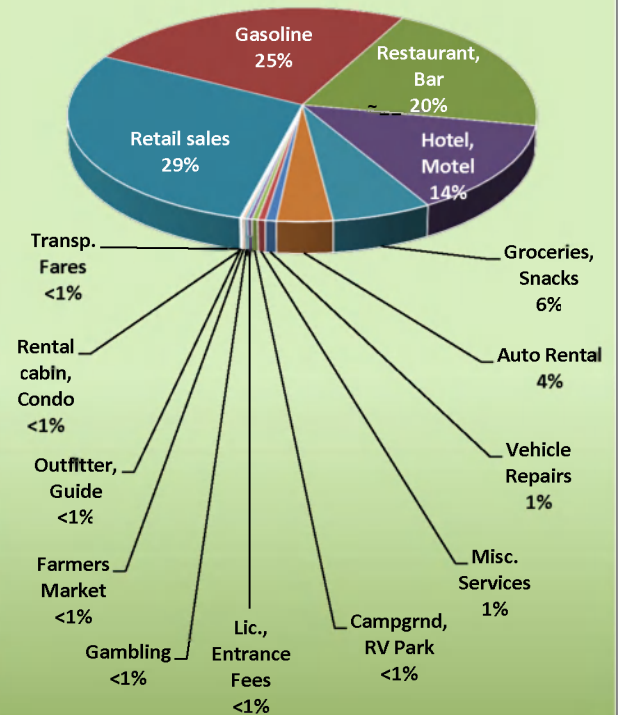
2011-2012 (2-year avg.) Nonresident Traveler Expenditures in Yellowstone County



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

Retail sales	\$129,010,000	Misc. Services	\$2,080,000
Gasoline	\$110,410,000	Campgrnd, RV Park	\$1,660,000
Restaurant, Bar	\$90,820,000	Lic., Entrance Fees	\$1,200,000
Hotel, Motel	\$60,870,000	Gambling	\$810,000
Groceries, Snacks	\$28,070,000	Farmers Market	\$640,000
Auto Rental	\$15,730,000	Rental cabin, Condo	\$370,000
Vehicle Repairs	\$3,050,000	Outfitter, Guide	\$230,000
		Transp. Fares	\$150,000
TOTAL		\$445,100,000	

2011-2012 Nonresident Expenditure Percentages in Yellowstone County



2011-2012 Contribution of Nonresident Traveler Expenditures in Yellowstone County

- 2011-2012 average spending^{*} in Yellowstone by nonresident visitors to Montana totaled \$445.1 million.
- This \$445.1 million in local spending directly supports \$349.1 million¹ of economic activity in the region, and supports an additional \$203.3 million²⁺³ of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$552.4 million.⁴

Table 2 - 2011-2012 Economic Impact

	Direct	Indirect	Induced	Combined
Industry Output	\$349,140,000 ¹	\$108,030,000 ²	\$95,270,000 ³	\$552,440,000 ⁴
Employment (# of jobs)	4,160	860	830	5,850
Employee Compensation	\$96,950,000	\$28,560,000	\$27,950,000	\$153,460,000
Proprietor Income	\$8,040,000	\$4,080,000	\$3,750,000	\$15,870,000
Other Property Type Income	\$42,660,000	\$17,050,000	\$18,470,000	\$78,180,000
State & Local Taxes	=	=	=	\$38,580,000

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 (2012 \$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.