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Kara Grau

*The University of Montana-Missoula*

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

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2012-2013

Kara Grau, M.S.

7/21/2014

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 18 of the 56 counties in the state which receive the highest spending.

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

Prepared by

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

2014

## Abstract

Money spent by those traveling to and through Montana has an effect not only on the businesses where spending occurs, but it ripples throughout the state's economy, as well. Statewide, spending by nonresidents (averaged over two years) totaled \$3.47 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 nearly \$3.5 billion throughout Montana during 2013 (estimate is an average of 2012 and 2013 nonresident spending). This was an increase of 13.6 percent over the previous year's spending estimate of \$3.05 billion (2011-2012 average).

- Yellowstone and Glacier travel regions received the highest percentage of nonresident spending, 29 and 28 percent, respectively.
- Of the 56 counties in Montana, Gallatin (\$667 million) and Flathead (\$518 million) Counties had the highest amount of spending.
- Eighteen counties had high enough nonresident traveler spending (approximately \$50 million, or greater) to allow for an economic impact analysis, the results of which are presented in the report.

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

2014

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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 18 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.

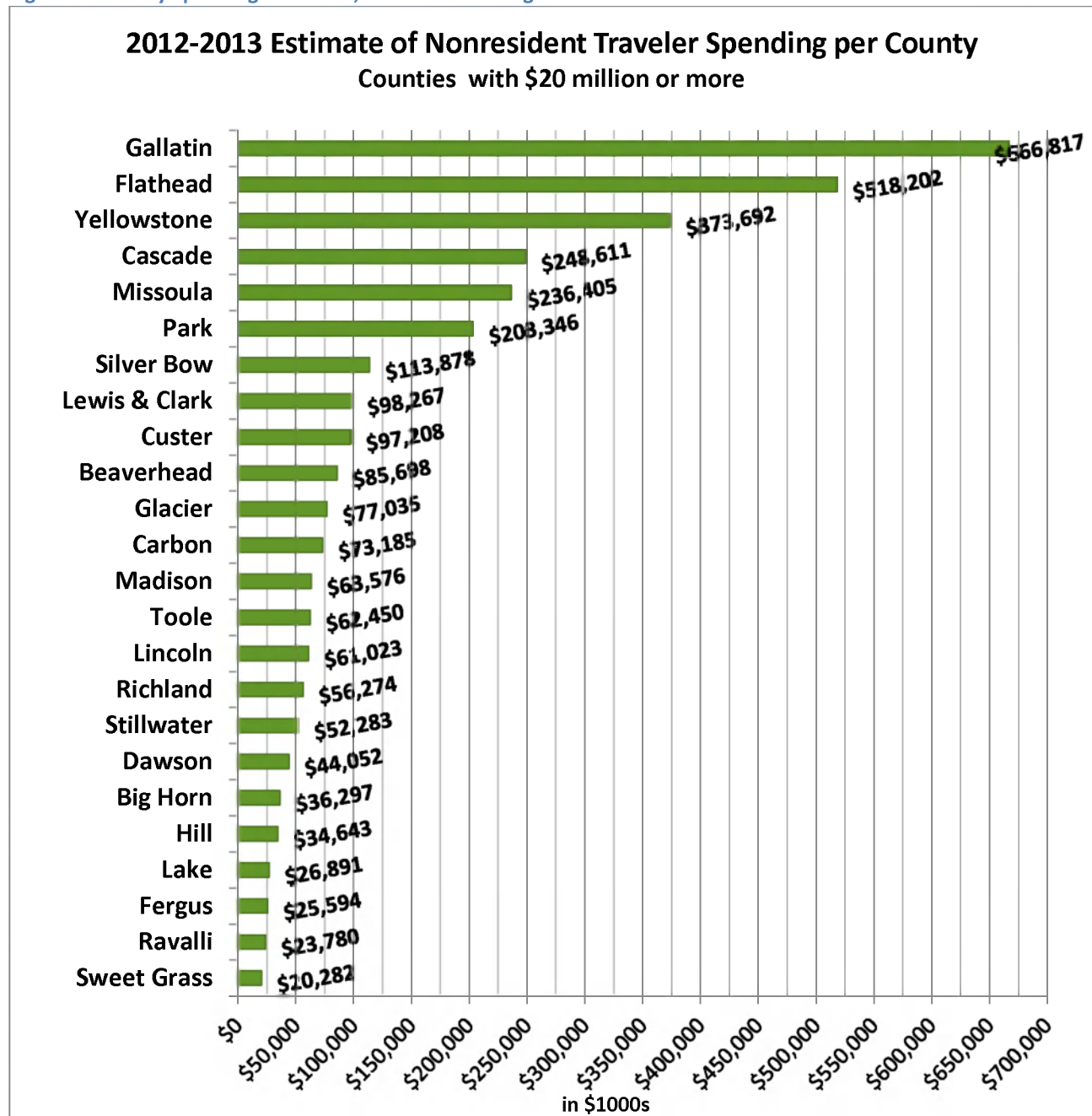
Table 1 - 2012-2013 Average Nonresident Spending per Expenditure Category

Expenditure Category	2012-2013 Total Nonresident Spending (2013 \$s)
Gasoline, Diesel	\$1,167,530,000
Retail sales	\$651,140,000
Restaurant, Bar	\$614,540,000
Hotel, Motel	\$348,920,000
Groceries, Snacks	\$284,430,000
Outfitter, Guide	\$124,360,000
Licenses, Entrance Fees	\$77,920,000
Auto Rental	\$65,990,000
Rental cabin, Condo	\$48,150,000
Vehicle Repairs	\$28,360,000
Campground, RV Park	\$24,150,000
Misc. Services	\$16,140,000
Gambling	\$8,690,000
Farmers Market	\$6,700,000
Transp. Fares	\$3,510,000
TOTAL	\$3,470,530,000

# Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties 2014

The statewide total 2012-2013 average spending is presented in Table 1. For the analyses highlighted in this report, the 2012 (inflation adjusted to 2013 \$s) and 2013 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. Table 2 displays total spending in the counties which received an estimated \$20 million or more in nonresident traveler spending.

Figure 1 - County Spending Estimates, 2012-2013 Average



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

2014

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 18 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 18 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 24 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, Carbon, Cascade, Custer, Dawson, Flathead, Gallatin, Glacier, Lewis and Clark, Madison, Missoula, Park, Richland, Silver Bow, Stillwater, Toole and Yellowstone. Other counties totaled less than approximately \$50 million in nonresident spending, and were, therefore, not analyzed.

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

2014

## 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.

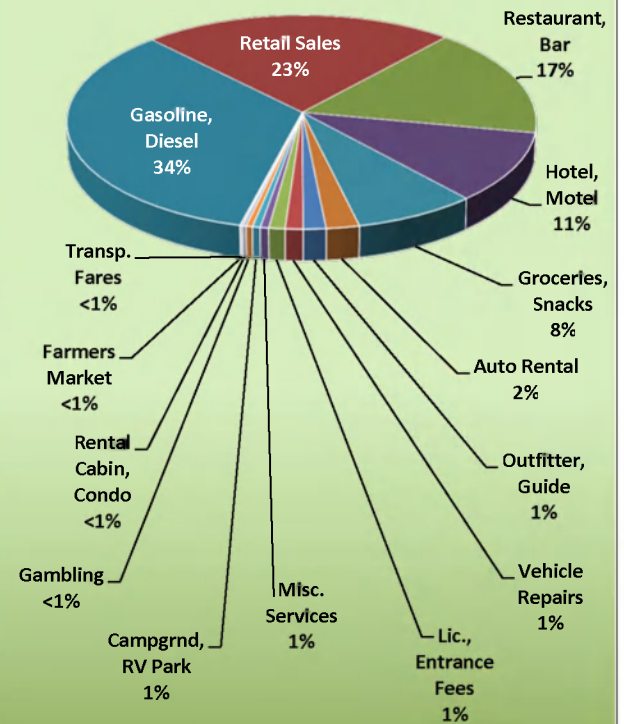
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 2-year avg.) Nonresident Traveler Expenditures in Central Montana Travel Region



### 2012-2013 Nonresident Expenditure Percentages in Central Montana Travel Region



**Table 1 - Total Nonresident Spending in Central Montana\*<sup>1</sup>**

Gasoline, Diesel	\$137,459,579	Vehicle Repairs	\$4,500,000
Retail Sales	\$93,848,360	Lic., Entrance Fees	\$4,100,000
Restaurant, Bar	\$67,216,685	Misc. Services	\$2,120,000
Hotel, Motel	\$42,700,354	Campground, RV Park	\$1,970,000
Groceries, Snacks	\$31,270,060	Gambling	\$1,620,000
Auto Rental	\$8,428,930	Rental Cabin, Condo	\$890,000
Outfitter, Guide	\$5,739,546	Farmers Market	\$510,000
		Transportation Fares	\$200,000
<b>TOTAL</b>		<b>\$402,570,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

- 2012-2013 average spending\* in Central Montana by nonresident visitors to Montana totaled \$402.6 million.
- This \$402.6 million in local spending directly supports \$297.7 million<sup>1</sup> of economic activity in the region, and supports an additional \$136.1 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$433.8 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$297,680,000 <sup>1</sup>	\$65,030,000 <sup>2</sup>	\$71,080,000 <sup>3</sup>	\$433,780,000 <sup>4</sup>
Employment (# of jobs)	3,500	530	660	4,690
Employee Compensation	\$79,210,000	\$17,230,000	\$19,160,000	\$115,600,000
Proprietor Income	\$15,070,000	\$3,900,000	\$4,310,000	\$23,280,000
Other Property Type Income	\$35,340,000	\$10,520,000	\$14,990,000	\$60,850,000
State & Local Taxes <sup>^</sup>	—	—	—	\$23,510,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

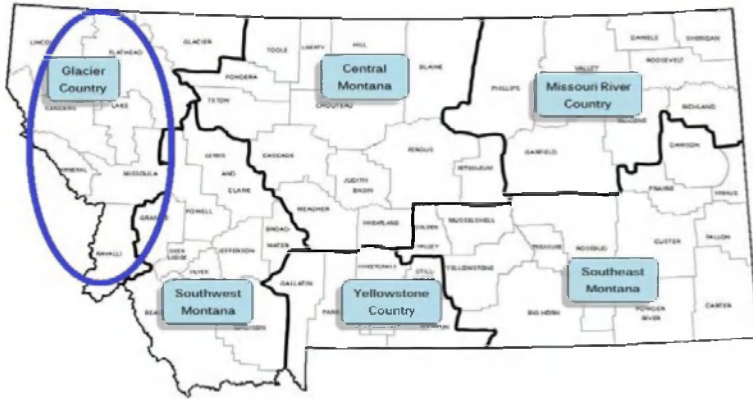
\*Data is collected at the state level. The two-year average of expenditures (2013 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding.

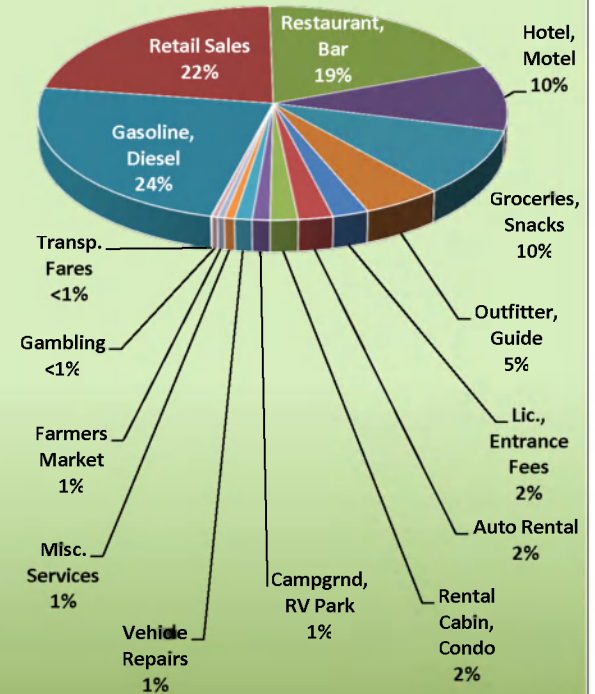
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Glacier Country Travel Region (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Glacier Country Travel Region



### 2012-2013 Nonresident Expenditure Percentages in Glacier Country Travel Region



**Table 1 - Total Nonresident Spending in Glacier Country\*<sup>0</sup>**

Gasoline, Diesel	\$228,350,693	Auto Rental	\$21,370,000
Retail Sales	\$217,692,983	Rental Cabin, Condo	\$17,010,000
Restaurant, Bar	\$188,815,390	Campground, RV Park	\$10,820,000
Hotel, Motel	\$96,868,559	Vehicle Repairs	\$10,540,000
Groceries, Snacks	\$95,737,680	Misc. Services	\$6,220,000
Outfitter, Guide	\$48,927,337	Farmers Market	\$4,300,000
Lic., Entrance Fees	\$22,238,304	Gambling	\$3,540,000
		Transportation Fares	\$520,000
<b>TOTAL</b>		<b>\$972,940,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Glacier Country Travel Region

- 2012-2013 average spending\* in Glacier Country by nonresident visitors to Montana totaled \$972.9 million.
- This \$972.9 million in local spending directly supports \$662.1 million<sup>1</sup> of economic activity in the region, and supports an additional \$422.6 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.08 billion.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$662,050,000 <sup>1</sup>	\$190,500,000 <sup>2</sup>	\$232,090,000 <sup>3</sup>	\$1,084,630,000 <sup>4</sup>
Employment (# of jobs)	9,560	1,760	2,240	13,560
Employee Compensation	\$219,790,000	\$47,320,000	\$64,450,000	\$331,560,000
Proprietor Income	\$40,490,000	\$11,540,000	\$12,790,000	\$64,820,000
Other Property Type Income	\$81,220,000	\$39,890,000	\$53,060,000	\$174,170,000
State & Local Taxes <sup>^</sup>	—	—	—	\$59,300,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

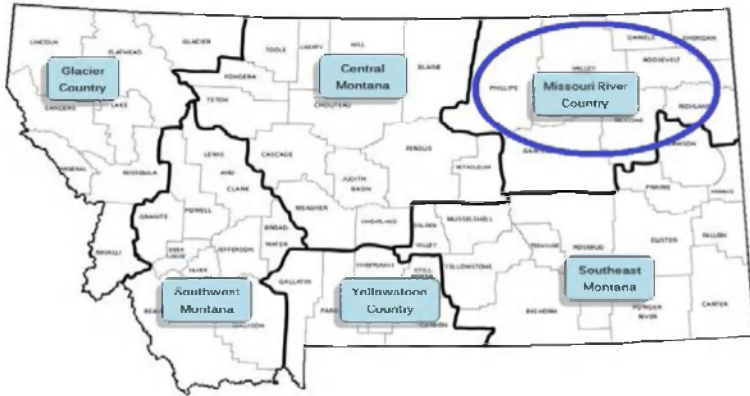
\*Data is collected at the state level. The two-year average of expenditures (2013 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

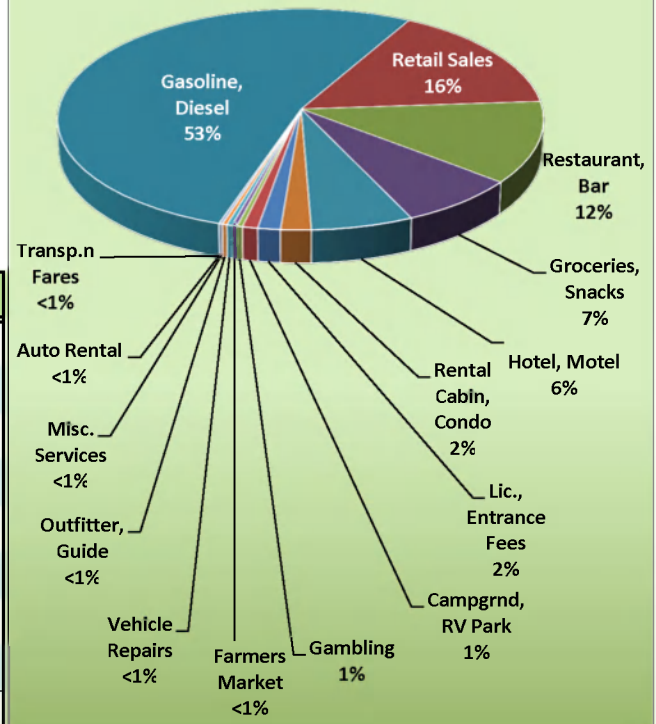
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Missouri River Country Travel Region (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Missouri River Country Travel Region



### 2012-2013 Nonresident Expenditure Percentages in Missouri River Country Travel Region



**Table 1 - Total Nonresident Spending in Missouri River Country<sup>\*,†</sup>**

Gasoline, Diesel	\$55,740,000	Campground, RV Park	\$970,000
Retail Sales	\$16,710,000	Gambling	\$360,000
Restaurant, Bar	\$12,550,000	Farmers Market	\$330,000
Groceries, Snacks	\$7,720,000	Vehicle Repairs	\$330,000
Hotel, Motel	\$6,550,000	Outfitter, Guide	\$290,000
Rental Cabin, Condo	\$1,940,000	Misc. Services	\$240,000
Lic., Entrance Fees	\$1,440,000	Auto Rental	Insufficient Sample Size
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$105.180.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Missouri River Country Travel Region

- 2012-2013 average spending\* in Missouri River Country by nonresident visitors to Montana totaled \$105.2 million.
- This \$105.2 million in local spending directly supports \$63.1 million<sup>1</sup> of economic activity in the region, and supports an additional \$22.9 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$85.9 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$63,090,000 <sup>1</sup>	\$11,360,000 <sup>2</sup>	\$11,490,000 <sup>3</sup>	\$85,940,000 <sup>4</sup>
Employment (# of jobs)	830	90	110	1,030
Employee Compensation	\$21,330,000	\$2,950,000	\$2,880,000	\$27,160,000
Proprietor Income	\$3,150,000	\$490,000	\$470,000	\$4,110,000
Other Property Type Income	\$7,660,000	\$1,860,000	\$2,660,000	\$12,180,000
State & Local Taxes <sup>^</sup>	—	—	—	\$6,080,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

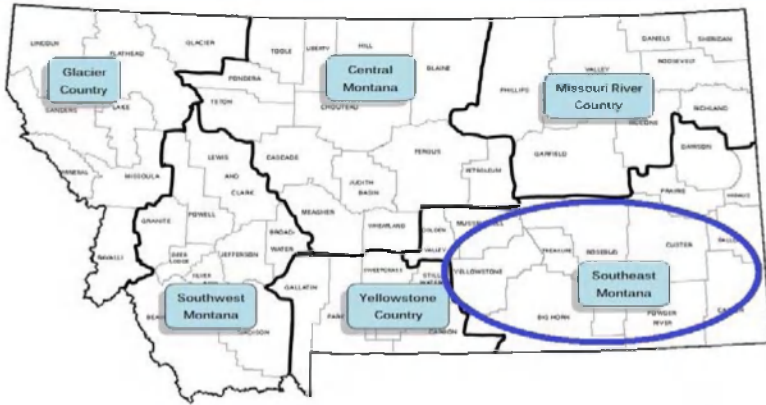
\*Data is collected at the state level. The two-year average of expenditures (2013 \$s) was used to help account for small and varying sample sizes at the county level.

†Expenditure category totals may not add to overall total due to rounding.

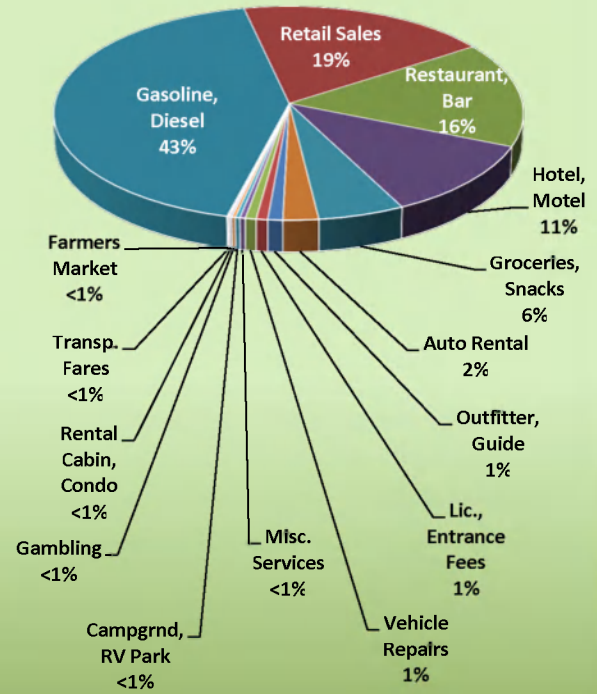
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Southeast Montana Travel Region (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Southeast Montana Travel Region



### 2012-2013 Nonresident Expenditure Percentages in Southeast Montana Travel Region



**Table 1 - Total Nonresident Spending in Southeast Montana\*<sup>0</sup>**

Gasoline, Diesel	\$245,460,000	Lic., Entrance Fees	\$4,110,000
Retail Sales	\$108,430,000	Vehicle Repairs	\$3,920,000
Restaurant, Bar	\$91,560,000	Misc. Services	\$1,940,000
Hotel, Motel	\$64,560,000	Campground, RV Park	\$1,670,000
Groceries, Snacks	\$31,370,000	Gambling	\$1,180,000
Auto Rental	\$12,870,000	Rental Cabin, Condo	\$760,000
Outfitter, Guide	\$5,380,000	Transportation Fares	\$620,000
		Farmers Market	\$490,000
<b>TOTAL</b>		<b>\$574,330,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Southeast Montana Travel Region

- 2012-2013 average spending\* in Southeast Montana by nonresident visitors to Montana totaled \$574.3 million.
- This \$574.3 million in local spending directly supports \$463.7 million<sup>1</sup> of economic activity in the region, and supports an additional \$227.8 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$691.4 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$463,680,000 <sup>1</sup>	\$110,130,000 <sup>2</sup>	\$117,640,000 <sup>3</sup>	\$691,440,000 <sup>4</sup>
Employment (# of jobs)	4,940	940	1,140	7,020
Employee Compensation	\$131,470,000	\$33,140,000	\$36,890,000	\$201,500,000
Proprietor Income	\$15,630,000	\$4,200,000	\$4,580,000	\$24,410,000
Other Property Type Income	\$57,700,000	\$20,170,000	\$26,000,000	\$103,870,000
State & Local Taxes <sup>^</sup>	—	—	—	\$36,380,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

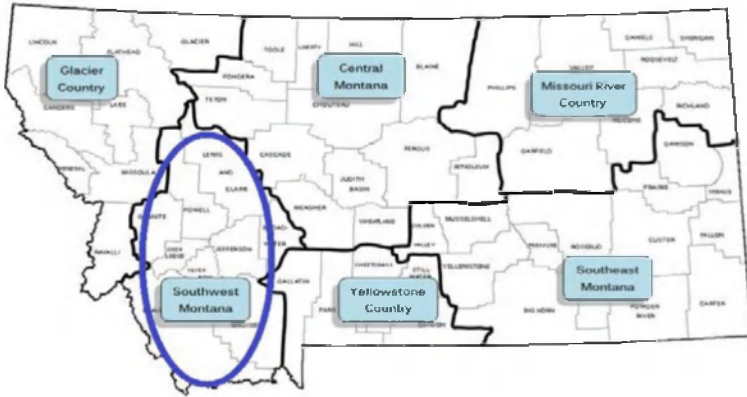
\*Data is collected at the state level. The two-year average of expenditures (2013 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding.

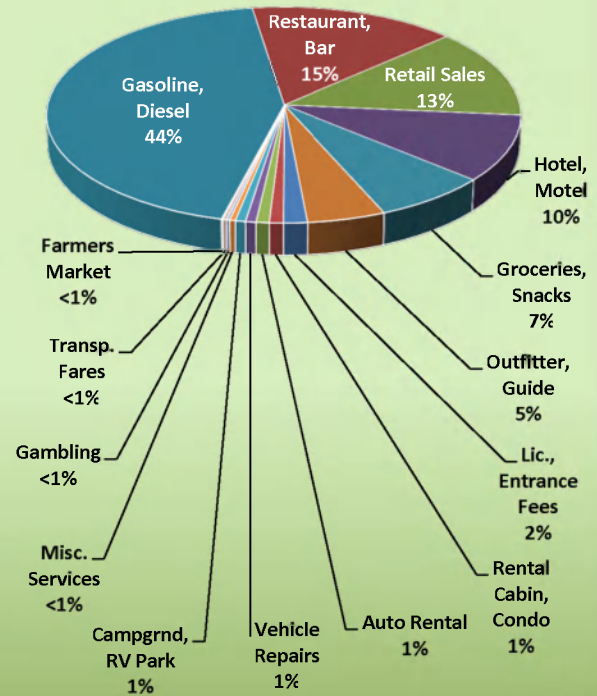
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Southwest Montana Travel Region (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Southwest Montana Travel Region



### 2012-2013 Nonresident Expenditure Percentages in Southwest Montana Travel Region



**Table 1 - Total Nonresident Spending in Southwest Montana<sup>\*,0</sup>**

Gasoline, Diesel	\$174,840,000	Rental Cabin, Condo	\$3,510,000
Restaurant, Bar	\$61,680,000	Auto Rental	\$3,240,000
Retail Sales	\$53,600,000	Vehicle Repairs	\$2,590,000
Hotel, Motel	\$39,620,000	Campground, RV Park	\$2,530,000
Groceries, Snacks	\$28,900,000	Misc. Services	\$1,390,000
Outfitter, Guide	\$19,700,000	Gambling	\$870,000
Lic., Entrance Fees	\$5,890,000	Transportation Fares	\$820,000
		Farmers Market	\$420,000
<b>TOTAL</b>		<b>\$399.610.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Southwest Montana Travel Region

- 2012-2013 average spending\* in Southwest Montana by nonresident visitors to Montana totaled \$399.6 million.
- This \$399.6 million in local spending directly supports \$263.5 million<sup>1</sup> of economic activity in the region, and supports an additional \$141.8 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$405.3 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$263,480,000 <sup>1</sup>	\$60,200,000 <sup>2</sup>	\$81,570,000 <sup>3</sup>	\$405,250,000 <sup>4</sup>
Employment (# of jobs)	3,280	520	780	4,590
Employee Compensation	\$86,040,000	\$16,560,000	\$22,720,000	\$125,320,000
Proprietor Income	\$26,360,000	\$3,250,000	\$4,510,000	\$34,120,000
Other Property Type Income	\$29,590,000	\$12,150,000	\$18,340,000	\$60,080,000
State & Local Taxes <sup>^</sup>	—	—	—	\$25,440,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

\*Data is collected at the state level. The two-year average of expenditures (2013 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

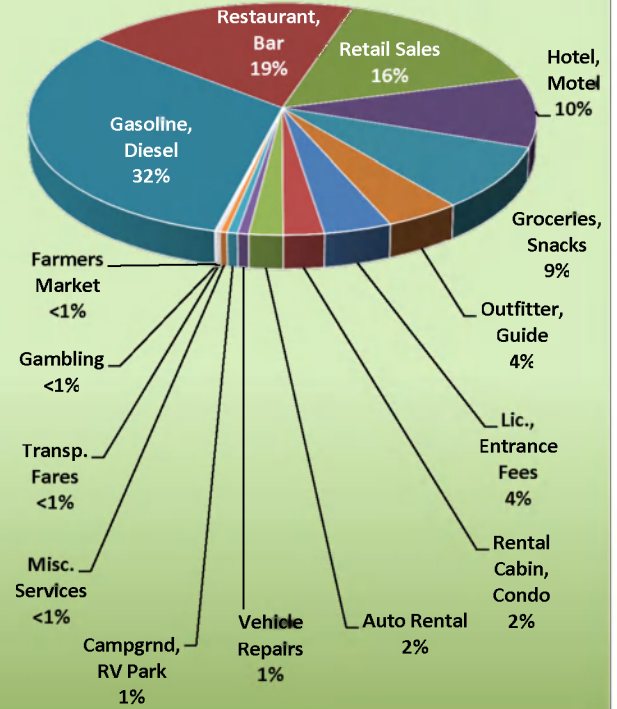
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone Country Travel Region (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Yellowstone Country Travel Region



### 2012-2013 Nonresident Expenditure Percentages in Yellowstone Country Travel Region



**Table 1 - Total Nonresident Spending in Yellowstone Country\*<sup>0</sup>**

Gasoline, Diesel	\$325,680,000	Rental Cabin, Condo	\$24,040,000
Restaurant, Bar	\$192,710,000	Auto Rental	\$20,090,000
Retail Sales	\$160,850,000	Vehicle Repairs	\$6,500,000
Hotel, Motel	\$98,610,000	Campground, RV Park	\$6,190,000
Groceries, Snacks	\$89,420,000	Misc. Services	\$4,240,000
Outfitter, Guide	\$44,320,000	Transportation Fares	\$1,350,000
Lic., Entrance Fees	\$40,140,000	Gambling	\$1,110,000
		Farmers Market	\$640,000
<b>TOTAL \$1.015.910.000</b>			

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Yellowstone Country Travel Region

- 2012-2013 average spending\* in Yellowstone Country by nonresident visitors to Montana totaled \$1.02 billion.
- This \$1.02 billion in local spending directly supports \$717.1 million<sup>1</sup> of economic activity in the region, and supports an additional \$404.2 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.12 billion.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$717,080,000 <sup>1</sup>	\$198,000,000 <sup>2</sup>	\$206,160,000 <sup>3</sup>	\$1,121,240,000 <sup>4</sup>
Employment (# of jobs)	9,680	1,780	1,950	13,410
Employee Compensation	\$239,680,000	\$51,010,000	\$54,810,000	\$345,500,000
Proprietor Income	\$41,140,000	\$11,540,000	\$11,670,000	\$64,350,000
Other Property Type Income	\$86,230,000	\$40,970,000	\$49,620,000	\$176,820,000
State & Local Taxes <sup>^</sup>	—	—	—	\$61,940,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

\*Data is collected at the state level. The two-year average of expenditures (2013 \$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.

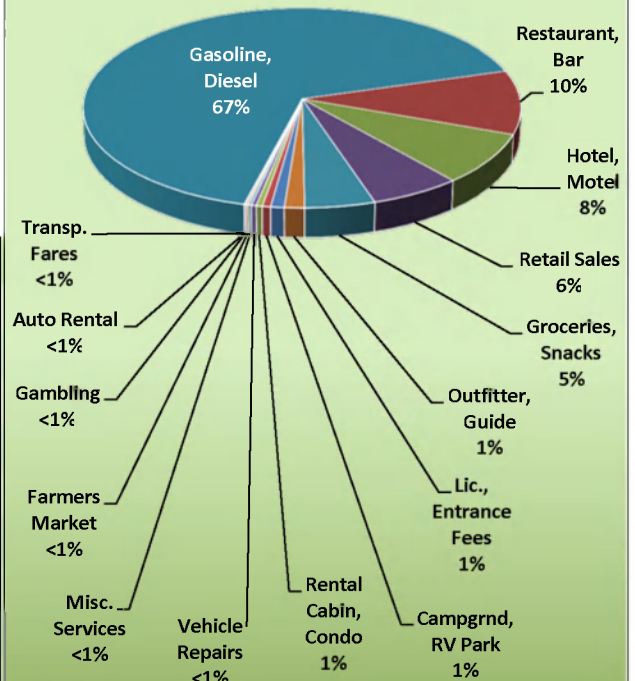
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Beaverhead County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Beaverhead County



### 2012-2013 Nonresident Expenditure Percentages in Beaverhead County



**Table 1 - Total Nonresident Spending in Beaverhead County\*<sup>0</sup>**

Gasoline, Diesel	\$56,954,059	Campground, RV Park	\$480,000
Restaurant, Bar	\$8,855,026	Rental Cabin, Condo	\$350,000
Hotel, Motel	\$7,054,179	Vehicle Repairs	\$280,000
Retail Sales	\$5,278,422	Misc. Services	\$170,000
Groceries, Snacks	\$4,068,500	Farmers Market	\$130,000
Outfitter, Guide	\$1,162,619	Gambling	\$120,000
Lic., Entrance Fees	\$784,630	Auto Rental	\$8,000
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$85.700.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Beaverhead County

- 2012-2013 average spending\* in Beaverhead County by nonresident visitors to Montana totaled \$85.7 million.
- This \$85.7 million in local spending directly supports \$44.8 million<sup>1</sup> of economic activity in the region, and supports an additional \$13.8 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$58.6 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$44,770,000 <sup>1</sup>	\$7,070,000 <sup>2</sup>	\$6,740,000 <sup>3</sup>	\$58,570,000 <sup>4</sup>
Employment (# of jobs)	570	80	70	720
Employee Compensation	\$12,020,000	\$1,360,000	\$1,580,000	\$14,960,000
Proprietor Income	\$1,620,000	\$560,000	\$350,000	\$2,530,000
Other Property Type Income	\$6,480,000	\$1,460,000	\$1,710,000	\$9,650,000
State & Local Taxes <sup>^</sup>	—	—	—	\$5,380,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

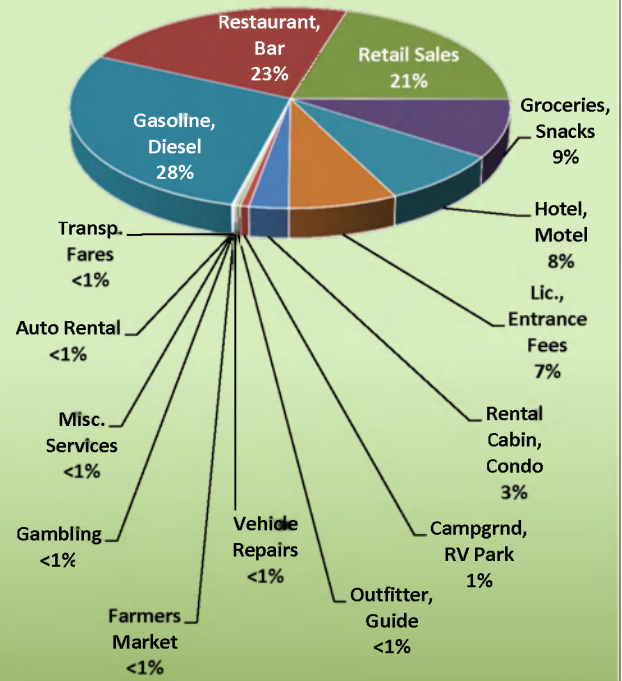
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Carbon County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Carbon County



### 2012-2013 Nonresident Expenditure Percentages in Carbon County



**Table 1 - Total Nonresident Spending in Carbon County<sup>\*0</sup>**

Gasoline, Diesel	\$20,720,000	Campground, RV Park	\$420,000
Restaurant, Bar	\$16,380,000	Outfitter, Guide	\$190,000
Retail Sales	\$15,020,000	Vehicle Repairs	\$110,000
Groceries, Snacks	\$6,840,000	Farmers Market	\$40,000
Hotel, Motel	\$6,090,000	Gambling	\$40,000
Lic., Entrance Fees	\$5,390,000	Misc. Services	\$40,000
Rental Cabin, Condo	\$1,930,000	Auto Rental	Insufficient Sample Size
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$73.190.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Carbon County

- 2012-2013 average spending\* in Carbon County by nonresident visitors to Montana totaled \$73.2 million.
- This \$73.2 million in local spending directly supports \$49.2 million<sup>1</sup> of economic activity in the region, and supports an additional \$18.4 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$67.6 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$49,190,000 <sup>1</sup>	\$10,450,000 <sup>2</sup>	\$7,930,000 <sup>3</sup>	\$67,570,000 <sup>4</sup>
Employment (# of jobs)	740	100	80	920
Employee Compensation	\$13,780,000	\$1,790,000	\$1,440,000	\$17,010,000
Proprietor Income	\$3,810,000	\$690,000	\$450,000	\$4,950,000
Other Property Type Income	\$6,460,000	\$2,690,000	\$2,360,000	\$11,510,000
State & Local Taxes <sup>^</sup>	—	—	—	\$4,110,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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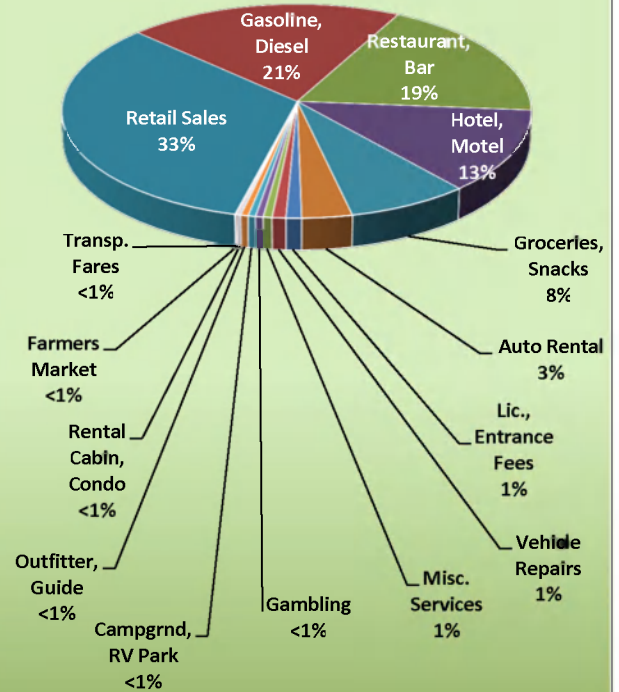
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Cascade County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Cascade County



### 2012-2013 Nonresident Expenditure Percentages in Cascade County



**Table 1 - Total Nonresident Spending in Cascade County<sup>\*,0</sup>**

Retail Sales	\$82,640,000	Vehicle Repairs	\$2,130,000
Gasoline, Diesel	\$51,160,000	Misc. Services	\$1,380,000
Restaurant, Bar	\$46,230,000	Gambling	\$1,190,000
Hotel, Motel	\$31,190,000	Campground, RV Park	\$1,160,000
Groceries, Snacks	\$19,130,000	Outfitter, Guide	\$1,160,000
Auto Rental	\$7,900,000	Rental Cabin, Condo	\$370,000
Lic., Entrance Fees	\$2,420,000	Farmers Market	\$350,000
		Transportation Fares	\$200,000
<b>TOTAL</b>		<b>\$248.610.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Cascade County

- 2012-2013 average spending\* in Cascade County by nonresident visitors to Montana totaled \$248.6 million.
- This \$248.6 million in local spending directly supports \$174.8 million<sup>1</sup> of economic activity in the region, and supports an additional \$92.4 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$267.2 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$174,800,000 <sup>1</sup>	\$42,970,000 <sup>2</sup>	\$49,390,000 <sup>3</sup>	\$267,160,000 <sup>4</sup>
Employment (# of jobs)	2,240	360	450	3,050
Employee Compensation	\$52,190,000	\$12,360,000	\$14,330,000	\$78,880,000
Proprietor Income	\$8,360,000	\$2,610,000	\$2,980,000	\$13,950,000
Other Property Type Income	\$21,000,000	\$6,660,000	\$10,010,000	\$37,670,000
State & Local Taxes <sup>^</sup>	—	—	—	\$13,200,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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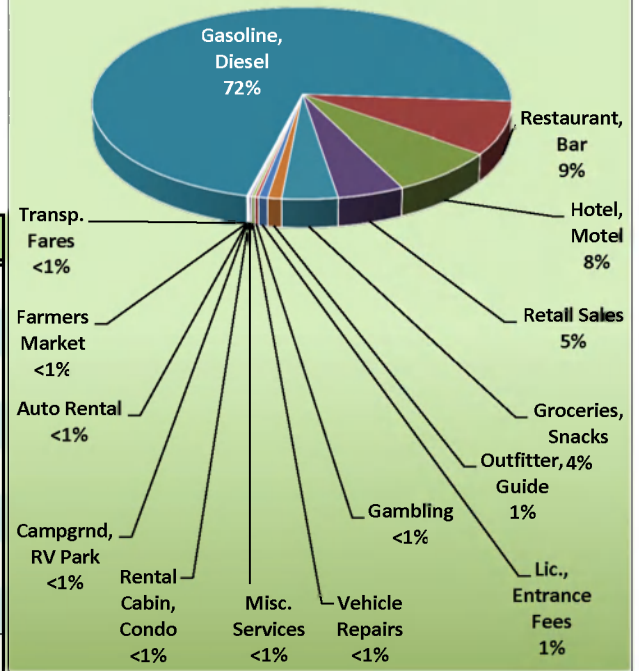
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Custer County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Custer County



### 2012-2013 Nonresident Expenditure Percentages in Custer County



**Table 1 - Total Nonresident Spending in Custer\***<sup>9</sup>

Gasoline, Diesel	\$70,240,000	Gambling	\$250,000
Restaurant, Bar	\$8,690,000	Vehicle Repairs	\$230,000
Hotel, Motel	\$7,500,000	Misc. Services	\$150,000
Retail Sales	\$4,580,000	Rental Cabin, Condo	\$80,000
Groceries, Snacks	\$3,830,000	Campground, RV Park	\$60,000
Outfitter, Guide	\$940,000	Auto Rental	\$20,000
Lic., Entrance Fees	\$630,000	Farmers Market	\$10,000
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$97,210,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Custer County

- 2012-2013 average spending\* in Custer County by nonresident visitors to Montana totaled \$97.2 million.
- This \$97.2 million in local spending directly supports \$61.2 million<sup>1</sup> of economic activity in the region, and supports an additional \$25.8 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$87.0 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$61,230,000 <sup>1</sup>	\$12,200,000 <sup>2</sup>	\$13,590,000 <sup>3</sup>	\$87,020,000 <sup>4</sup>
Employment (# of jobs)	800	120	140	1,060
Employee Compensation	\$19,410,000	\$3,140,000	\$3,960,000	\$26,510,000
Proprietor Income	\$1,510,000	\$690,000	\$530,000	\$2,730,000
Other Property Type Income	\$8,310,000	\$2,010,000	\$3,020,000	\$13,340,000
State & Local Taxes <sup>^</sup>	—	—	—	\$6,930,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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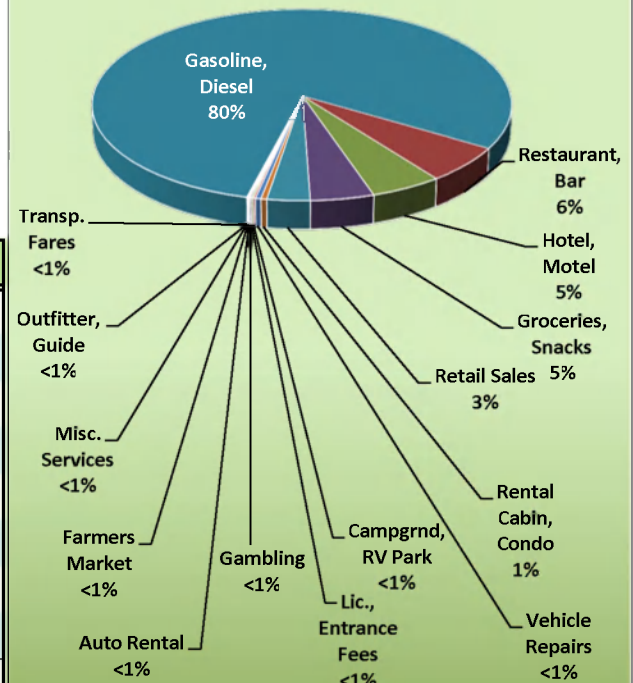
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Dawson County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Dawson County



### 2012-2013 Nonresident Expenditure Percentages in Dawson County



**Table 1 - Total Nonresident Spending in Dawson<sup>\*,0</sup>**

Gasoline, Diesel	\$35,210,000	Campground, RV Park	\$70,000
Restaurant, Bar	\$2,680,000	Lic., Entrance Fees	\$60,000
Hotel, Motel	\$2,230,000	Gambling	\$50,000
Groceries, Snacks	\$1,980,000	Auto Rental	\$40,000
Retail Sales	\$1,330,000	Farmers Market	\$30,000
Rental Cabin, Condo	\$180,000	Misc. Services	\$20,000
Vehicle Repairs	\$170,000	Outfitter, Guide	Insufficient Sample Size
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>	<b>\$44,050,000</b>		

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Dawson County

- 2012-2013 average spending\* in Dawson County by nonresident visitors to Montana totaled \$44.1 million.
- This \$44.1 million in local spending directly supports \$26.4 million<sup>1</sup> of economic activity in the region, and supports an additional \$9.1 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$35.6 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$26,410,000 <sup>1</sup>	\$4,280,000 <sup>2</sup>	\$4,860,000 <sup>3</sup>	\$35,550,000 <sup>4</sup>
Employment (# of jobs)	310	40	50	400
Employee Compensation	\$9,520,000	\$1,160,000	\$1,380,000	\$12,060,000
Proprietor Income	\$280,000	\$140,000	\$110,000	\$530,000
Other Property Type Income	\$3,430,000	\$830,000	\$1,200,000	\$5,460,000
State & Local Taxes <sup>^</sup>	—	—	—	\$3,000,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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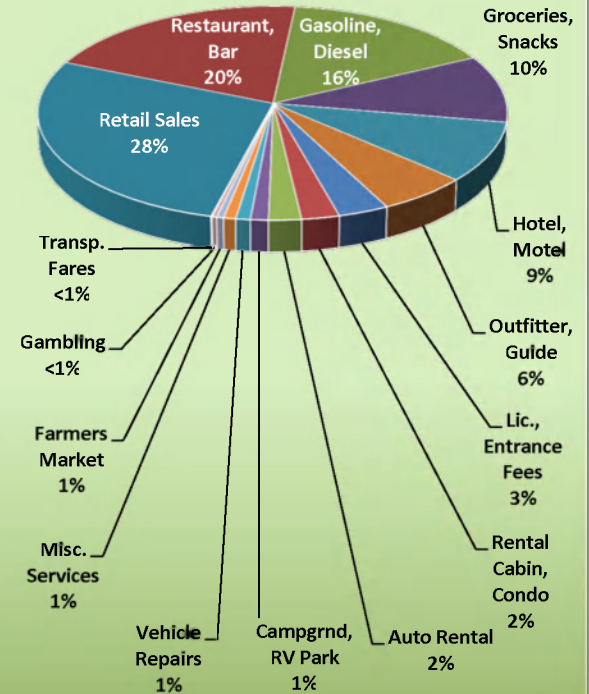
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Flathead County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Flathead County



### 2012-2013 Nonresident Expenditure Percentages in Flathead County



**Table 1 - Total Nonresident Spending in Flathead County<sup>\*,0</sup>**

Retail Sales	\$143,270,000	Rental Cabin, Condo	\$12,370,000
Restaurant, Bar	\$104,130,000	Auto Rental	\$10,680,000
Gasoline, Diesel	\$82,860,000	Campground, RV Park	\$5,840,000
Groceries, Snacks	\$52,810,000	Vehicle Repairs	\$4,700,000
Hotel, Motel	\$46,670,000	Misc. Services	\$3,940,000
Outfitter, Guide	\$30,150,000	Farmers Market	\$2,250,000
Lic., Entrance Fees	\$16,610,000	Gambling	\$1,540,000
		Transportation Fares	\$380,000
<b>TOTAL</b>		<b>\$518,200,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Flathead County

- 2012-2013 average spending\* in Flathead County by nonresident visitors to Montana totaled \$518.2 million.
- This \$518.2 million in local spending directly supports \$342.7 million<sup>1</sup> of economic activity in the region, and supports an additional \$211.1 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$553.8 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$342,660,000 <sup>1</sup>	\$93,800,000 <sup>2</sup>	\$117,340,000 <sup>3</sup>	\$553,810,000 <sup>4</sup>
Employment (# of jobs)	5,000	900	1,100	7,000
Employee Compensation	\$123,510,000	\$22,120,000	\$32,290,000	\$177,920,000
Proprietor Income	\$19,430,000	\$6,900,000	\$7,390,000	\$33,720,000
Other Property Type Income	\$41,560,000	\$21,110,000	\$27,480,000	\$90,150,000
State & Local Taxes <sup>^</sup>	—	—	—	\$28,440,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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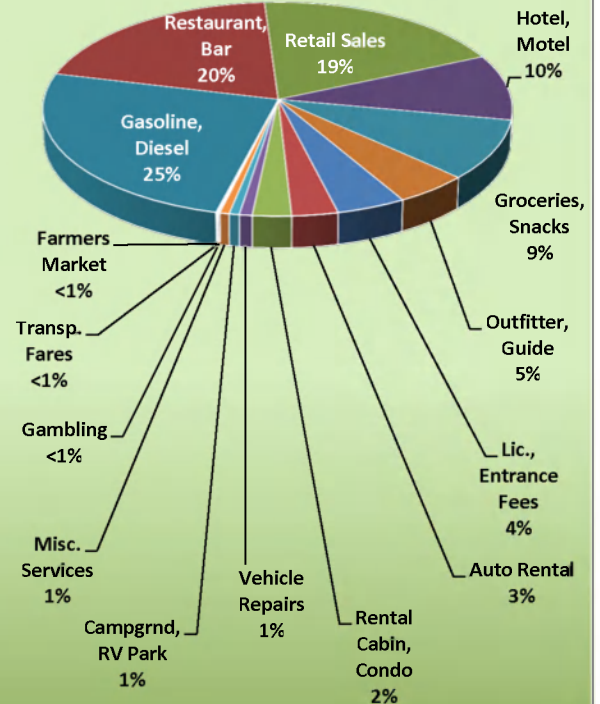
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Gallatin County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Gallatin County



### 2012-2013 Nonresident Expenditure Percentages in Gallatin County



**Table 1 - Total Nonresident Spending in Gallatin County<sup>\*,0</sup>**

Gasoline, Diesel	\$167,150,000	Auto Rental	\$19,480,000
Restaurant, Bar	\$133,520,000	Rental Cabin, Condo	\$16,350,000
Retail Sales	\$127,840,000	Vehicle Repairs	\$5,340,000
Hotel, Motel	\$66,130,000	Campground, RV Park	\$4,240,000
Groceries, Snacks	\$60,360,000	Misc. Services	\$3,900,000
Outfitter, Guide	\$31,530,000	Gambling	\$660,000
Lic., Entrance Fees	\$29,280,000	Transportation Fares	\$570,000
		Farmers Market	\$460,000
<b>TOTAL</b>		<b>\$666.820,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Gallatin County

- 2012-2013 average spending\* in Gallatin County by nonresident visitors to Montana totaled \$666.8 million.
- This \$666.8 million in local spending directly supports \$476.8 million<sup>1</sup> of economic activity in the region, and supports an additional \$272.1 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$748.9 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$476,780,000 <sup>1</sup>	\$125,880,000 <sup>2</sup>	\$146,250,000 <sup>3</sup>	\$748,910,000 <sup>4</sup>
Employment (# of jobs)	6,490	1,120	1,370	8,980
Employee Compensation	\$172,940,000	\$34,100,000	\$41,290,000	\$248,330,000
Proprietor Income	\$21,360,000	\$7,120,000	\$8,310,000	\$36,790,000
Other Property Type Income	\$57,800,000	\$25,620,000	\$34,170,000	\$117,590,000
State & Local Taxes <sup>^</sup>	—	—	—	\$41,190,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

\*Data is collected at the state level. The two-year average of expenditures (2013 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

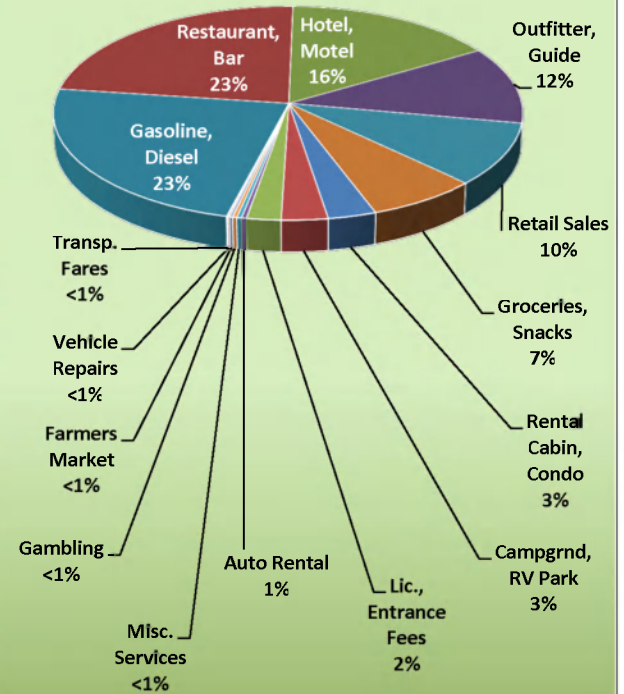
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Glacier County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Glacier County



### 2012-2013 Nonresident Expenditure Percentages in Glacier County



**Table 1 - Total Nonresident Spending in Glacier County<sup>\*,0</sup>**

Gasoline, Diesel	\$17,950,000	Campground, RV Park	\$2,260,000
Restaurant, Bar	\$17,810,000	Lic., Entrance Fees	\$1,660,000
Hotel, Motel	\$12,290,000	Auto Rental	\$240,000
Outfitter, Guide	\$9,000,000	Misc. Services	\$230,000
Retail Sales	\$7,320,000	Gambling	\$190,000
Groceries, Snacks	\$5,430,000	Farmers Market	\$180,000
Rental Cabin, Condo	\$2,350,000	Vehicle Repairs	\$90,000
		Transportation Fares	\$40,000
<b>TOTAL</b>		<b>\$77.030.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Glacier County

- 2012-2013 average spending\* in Glacier County by nonresident visitors to Montana totaled \$77.0 million.
- This \$77.0 million in local spending directly supports \$58.9 million<sup>1</sup> of economic activity in the region, and supports an additional \$16.2 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$75.1 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$58,880,000 <sup>1</sup>	\$7,290,000 <sup>2</sup>	\$8,950,000 <sup>3</sup>	\$75,120,000 <sup>4</sup>
Employment (# of jobs)	860	70	110	1,040
Employee Compensation	\$21,380,000	\$1,580,000	\$1,990,000	\$24,950,000
Proprietor Income	\$1,670,000	\$360,000	\$450,000	\$2,480,000
Other Property Type Income	\$7,430,000	\$1,620,000	\$2,490,000	\$11,540,000
State & Local Taxes <sup>^</sup>	—	—	—	\$4,600,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

\*Data is collected at the state level. The two-year average of expenditures (2013 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

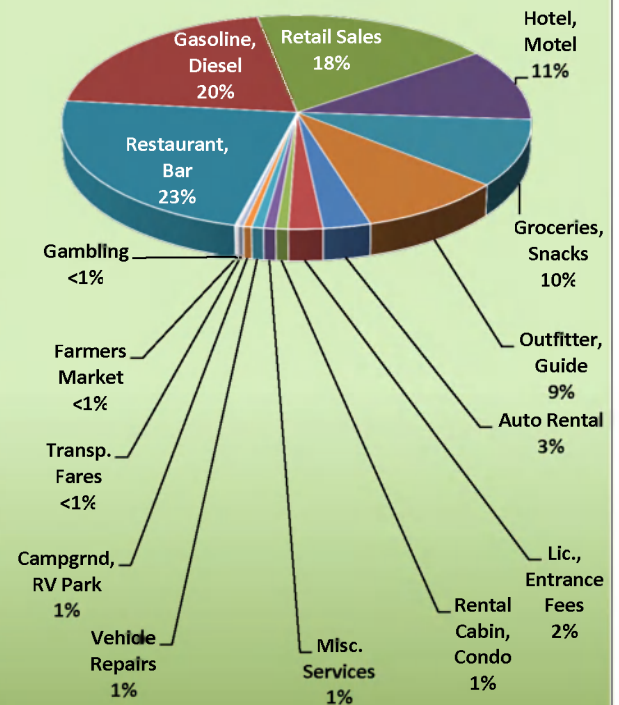
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Lewis and Clark County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Lewis and Clark



### 2012-2013 Nonresident Expenditure Percentages in Lewis and Clark County



**Table 1 - Total Nonresident Spending in Lewis and Clark County<sup>\*,†</sup>**

Restaurant, Bar	\$22,470,000	Lic., Entrance Fees	\$2,130,000
Gasoline, Diesel	\$19,920,000	Rental Cabin, Condo	\$750,000
Retail Sales	\$17,710,000	Misc. Services	\$750,000
Hotel, Motel	\$10,810,000	Vehicle Repairs	\$740,000
Groceries, Snacks	\$9,890,000	Campground, RV Park	\$510,000
Outfitter, Guide	\$9,090,000	Transportation Fares	\$340,000
Auto Rental	\$2,960,000	Farmers Market	\$120,000
		Gambling	\$70,000
<b>TOTAL</b>	<b>\$98,270,000</b>		

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Lewis and Clark County

- 2012-2013 average spending\* in Lewis and Clark County by nonresident visitors to Montana totaled \$98.3 million.
- This \$98.3 million in local spending directly supports \$68.9 million<sup>1</sup> of economic activity in the region, and supports an additional \$35.0 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$103.9 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$68,890,000 <sup>1</sup>	\$16,370,000 <sup>2</sup>	\$18,670,000 <sup>3</sup>	\$103,930,000 <sup>4</sup>
Employment (# of jobs)	1,040	150	180	1,370
Employee Compensation	\$24,450,000	\$4,880,000	\$5,690,000	\$35,020,000
Proprietor Income	\$2,700,000	\$680,000	\$770,000	\$4,150,000
Other Property Type Income	\$8,250,000	\$3,490,000	\$4,340,000	\$16,080,000
State & Local Taxes <sup>^</sup>	—	—	—	\$5,970,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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†Expenditure category totals may not add to overall total due to rounding.

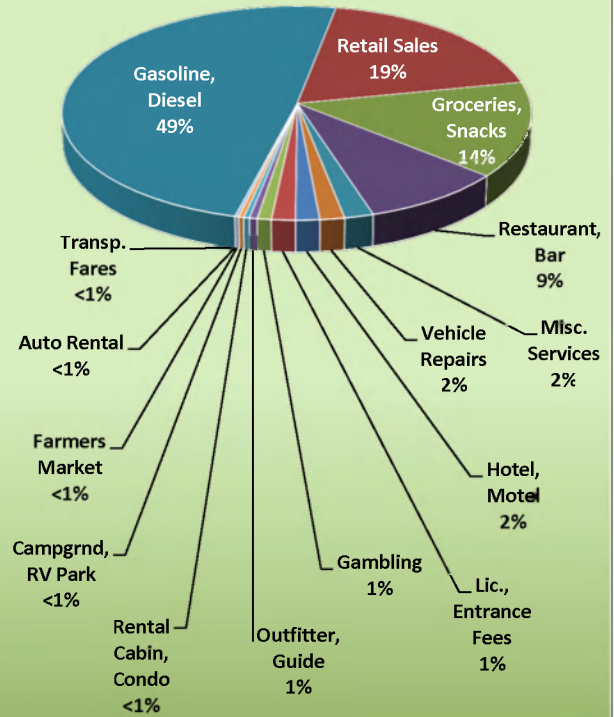
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Lincoln County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Lincoln



### 2012-2013 Nonresident Expenditure Percentages in Lincoln County



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

Gasoline, Diesel	\$29,900,000	Lic., Entrance Fees	\$910,000
Retail Sales	\$11,500,000	Gambling	\$540,000
Groceries, Snacks	\$8,780,000	Outfitter, Guide	\$300,000
Restaurant, Bar	\$5,530,000	Rental Cabin, Condo	\$220,000
Misc. Services	\$1,120,000	Campground, RV Park	\$190,000
Vehicle Repairs	\$950,000	Farmers Market	\$150,000
Hotel, Motel	\$920,000	Auto Rental	Insufficient Sample Size
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$61,020,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Lincoln County

- 2012-2013 average spending\* in Lincoln County by nonresident visitors to Montana totaled \$61.0 million.
- This \$61.0 million in local spending directly supports \$33.4 million<sup>1</sup> of economic activity in the region, and supports an additional \$12.2 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$45.6 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$33,390,000 <sup>1</sup>	\$5,550,000 <sup>2</sup>	\$6,660,000 <sup>3</sup>	\$45,600,000 <sup>4</sup>
Employment (# of jobs)	470	50	70	590
Employee Compensation	\$9,230,000	\$1,080,000	\$1,570,000	\$11,880,000
Proprietor Income	\$4,260,000	\$340,000	\$310,000	\$4,910,000
Other Property Type Income	\$3,830,000	\$1,280,000	\$1,800,000	\$6,910,000
State & Local Taxes <sup>^</sup>	—	—	—	\$3,140,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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◊Expenditure category totals may not add to overall total due to rounding.

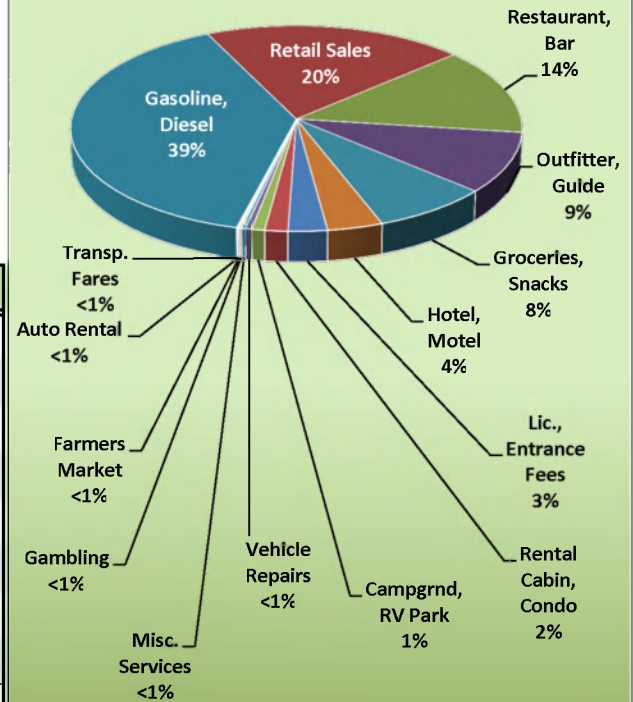
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Madison County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Madison County



### 2012-2013 Nonresident Expenditure Percentages in Madison County



**Table 1 - Total Nonresident Spending in Madison County<sup>\*,0</sup>**

Gasoline, Diesel	\$24,850,000	Rental Cabin, Condo	\$960,000
Retail Sales	\$12,920,000	Campground, RV Park	\$540,000
Restaurant, Bar	\$8,750,000	Vehicle Repairs	\$260,000
Outfitter, Guide	\$6,040,000	Misc. Services	\$170,000
Groceries, Snacks	\$4,930,000	Gambling	\$80,000
Hotel, Motel	\$2,320,000	Farmers Market	\$70,000
Lic., Entrance Fees	\$1,630,000	Auto Rental	\$50,000
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$63.580.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Madison County

- 2012-2013 average spending\* in Madison County by nonresident visitors to Montana totaled \$63.6 million.
- This \$63.6 million in local spending directly supports \$38.9 million<sup>1</sup> of economic activity in the region, and supports an additional \$12.7 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$51.7 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$38,940,000 <sup>1</sup>	\$5,360,000 <sup>2</sup>	\$7,350,000 <sup>3</sup>	\$51,660,000 <sup>4</sup>
Employment (# of jobs)	480	60	60	600
Employee Compensation	\$15,080,000	\$1,090,000	\$1,580,000	\$17,750,000
Proprietor Income	\$3,060,000	\$410,000	\$410,000	\$3,880,000
Other Property Type Income	\$4,160,000	\$1,260,000	\$2,100,000	\$7,520,000
State & Local Taxes <sup>^</sup>	—	—	—	\$3,410,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

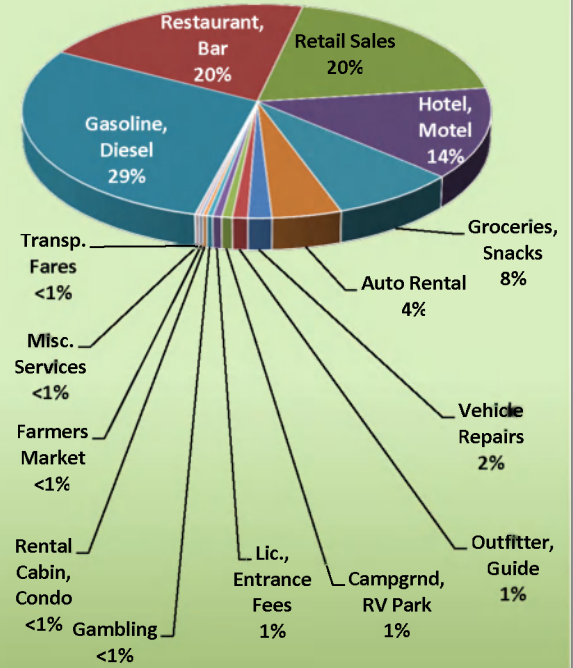
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Missoula County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Missoula County



### 2012-2013 Nonresident Expenditure Percentages in Missoula County



**Table 1 - Total Nonresident Spending in Missoula County\*,<sup>0</sup>**

Gasoline, Diesel	\$68,940,000	Outfitter, Guide	\$2,270,000
Restaurant, Bar	\$48,140,000	Campground, RV Park	\$1,560,000
Retail Sales	\$46,200,000	Lic., Entrance Fees	\$1,320,000
Hotel, Motel	\$32,350,000	Gambling	\$890,000
Groceries, Snacks	\$19,000,000	Rental Cabin, Condo	\$590,000
Auto Rental	\$10,420,000	Farmers Market	\$580,000
Vehicle Repairs	\$3,540,000	Misc. Services	\$510,000
		Transportation Fares	\$100,000
<b>TOTAL</b>		<b>\$236.400.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Missoula County

- 2012-2013 average spending\* in Missoula County by nonresident visitors to Montana totaled \$236.4 million.
- This \$236.4 million in local spending directly supports \$162.2 million<sup>1</sup> of economic activity in the region, and supports an additional \$105.2 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$267.4 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$162,240,000 <sup>1</sup>	\$48,360,000 <sup>2</sup>	\$56,840,000 <sup>3</sup>	\$267,440,000 <sup>4</sup>
Employment (# of jobs)	2,210	440	550	3,200
Employee Compensation	\$52,850,000	\$14,430,000	\$17,320,000	\$84,600,000
Proprietor Income	\$10,220,000	\$2,350,000	\$2,830,000	\$15,400,000
Other Property Type Income	\$19,510,000	\$9,440,000	\$12,570,000	\$41,520,000
State & Local Taxes <sup>^</sup>	—	—	—	\$14,550,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

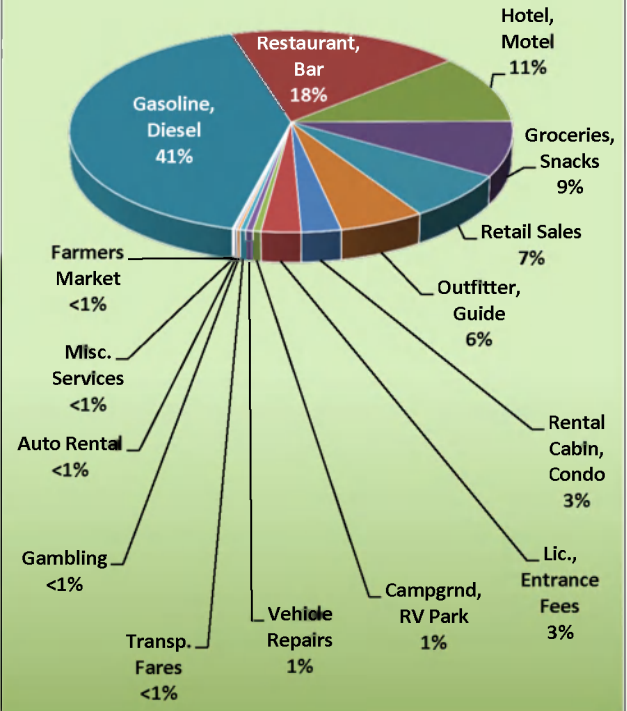
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Park County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Park County



### 2012-2013 Nonresident Expenditure Percentages in Park County



**Table 1 - Total Nonresident Spending in Park<sup>\*,†</sup>**

Gasoline, Diesel	\$84,140,000	Lic., Entrance Fees	\$5,380,000
Restaurant, Bar	\$37,540,000	Campground, RV Park	\$1,090,000
Hotel, Motel	\$22,600,000	Vehicle Repairs	\$980,000
Groceries, Snacks	\$17,850,000	Transportation Fares	\$770,000
Retail Sales	\$14,900,000	Gambling	\$400,000
Outfitter, Guide	\$11,610,000	Auto Rental	\$370,000
Rental Cabin, Condo	\$5,420,000	Misc. Services	\$200,000
		Farmers Market	\$80,000
<b>TOTAL</b>		<b>\$203.350,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Park County

- 2012-2013 average spending\* in Park County by nonresident visitors to Montana totaled \$203.4 million.
- This \$203.4 million in local spending directly supports \$142.4 million<sup>1</sup> of economic activity in the region, and supports an additional \$52.9 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$195.3 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$142,360,000 <sup>1</sup>	\$27,360,000 <sup>2</sup>	\$25,590,000 <sup>3</sup>	\$195,320,000 <sup>4</sup>
Employment (# of jobs)	2,060	310	270	2,640
Employee Compensation	\$47,830,000	\$6,490,000	\$6,360,000	\$60,680,000
Proprietor Income	\$5,570,000	\$1,530,000	\$1,150,000	\$8,250,000
Other Property Type Income	\$18,350,000	\$5,350,000	\$7,060,000	\$30,760,000
State & Local Taxes <sup>^</sup>	—	—	—	\$12,340,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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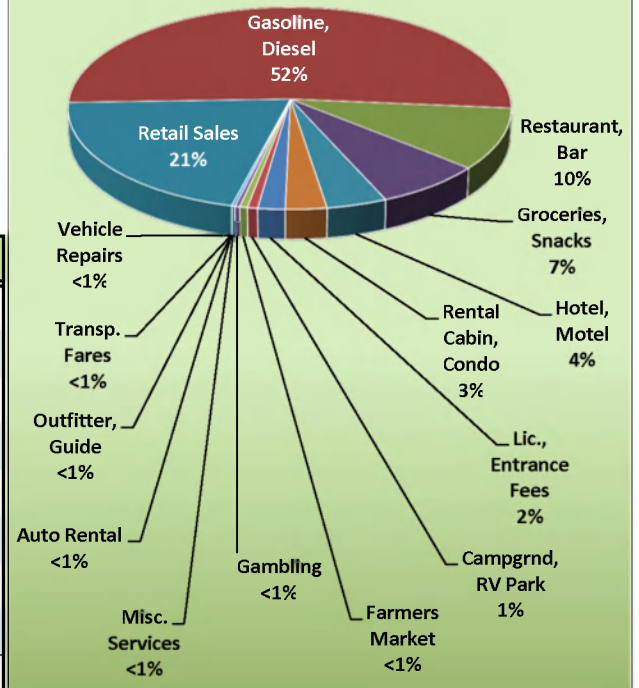
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Richland County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Richland County



### 2012-2013 Nonresident Expenditure Percentages in Richland County



**Table 1 - Total Nonresident Spending in Richland<sup>\*,0</sup>**

Retail Sales	\$11,580,000	Campground, RV Park	\$380,000
Gasoline, Diesel	\$29,250,000	Farmers Market	\$290,000
Restaurant, Bar	\$5,520,000	Gambling	\$180,000
Groceries, Snacks	\$4,110,000	Misc. Services	\$130,000
Hotel, Motel	\$2,280,000	Auto Rental	Insufficient Sample Size
Rental Cabin, Condo	\$1,550,000	Outfitter, Guide	Insufficient Sample Size
Lic., Entrance Fees	\$1,020,000	Transportation Fares	Insufficient Sample Size
		Vehicle Repairs	Insufficient Sample Size
<b>TOTAL</b>		<b>\$56.270.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Richland County

- 2012-2013 average spending\* in Richland County by nonresident visitors to Montana totaled \$56.3 million.
- This \$56.3 million in local spending directly supports \$32.0 million<sup>1</sup> of economic activity in the region, and supports an additional \$9.1 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$41.1 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$31,990,000 <sup>1</sup>	\$4,370,000 <sup>2</sup>	\$4,730,000 <sup>3</sup>	\$41,090,000 <sup>4</sup>
Employment (# of jobs)	390	40	50	480
Employee Compensation	\$12,150,000	\$1,460,000	\$1,360,000	\$14,970,000
Proprietor Income	\$1,700,000	\$190,000	\$170,000	\$2,060,000
Other Property Type Income	\$3,740,000	\$630,000	\$980,000	\$5,350,000
State & Local Taxes <sup>^</sup>	—	—	—	\$2,740,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

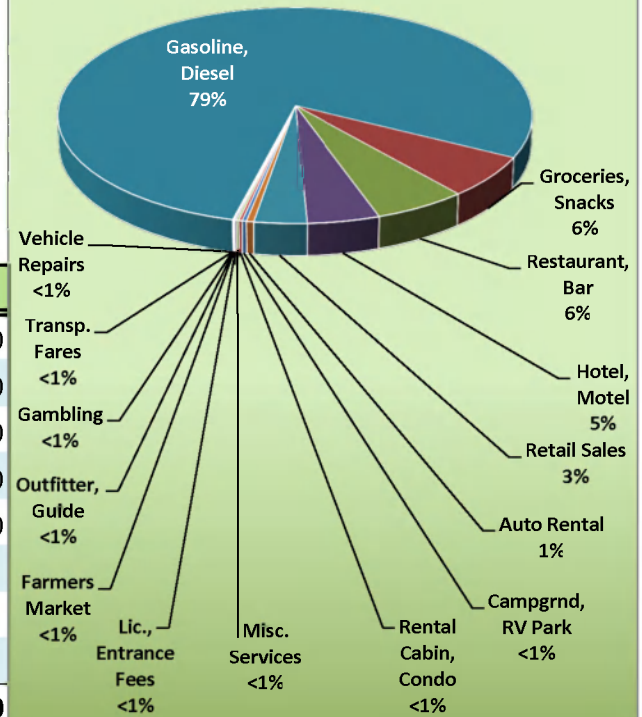
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Stillwater County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Stillwater County



### 2012-2013 Nonresident Expenditure Percentages in Stillwater County



**Table 1 - Total Nonresident Spending in Stillwater County\*<sup>0</sup>**

Gasoline, Diesel	\$41,210,000	Rental Cabin, Condo	\$110,000
Groceries, Snacks	\$3,240,000	Misc. Services	\$80,000
Restaurant, Bar	\$3,040,000	Lic., Entrance Fees	\$60,000
Hotel, Motel	\$2,380,000	Farmers Market	\$30,000
Retail Sales	\$1,720,000	Outfitter, Guide	\$20,000
Auto Rental	\$240,000	Gambling	Insufficient Sample Size
Campground, RV Park	\$140,000	Transportation Fares	Insufficient Sample Size
		Vehicle Repairs	Insufficient Sample Size
<b>TOTAL</b>		<b>\$52,280,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Stillwater County

- 2012-2013 average spending\* in Stillwater County by nonresident visitors to Montana totaled \$52.3 million.
- This \$52.3 million in local spending directly supports \$29.9 million<sup>1</sup> of economic activity in the region, and supports an additional \$6.6 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$36.4 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$29,850,000 <sup>1</sup>	\$3,510,000 <sup>2</sup>	\$3,060,000 <sup>3</sup>	\$36,420,000 <sup>4</sup>
Employment (# of jobs)	370	40	30	440
Employee Compensation	\$10,110,000	\$870,000	\$510,000	\$11,490,000
Proprietor Income	\$990,000	\$280,000	\$190,000	\$1,460,000
Other Property Type Income	\$3,900,000	\$640,000	\$1,000,000	\$5,540,000
State & Local Taxes <sup>A</sup>	—	—	—	\$2,690,000

**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.

<sup>A</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.

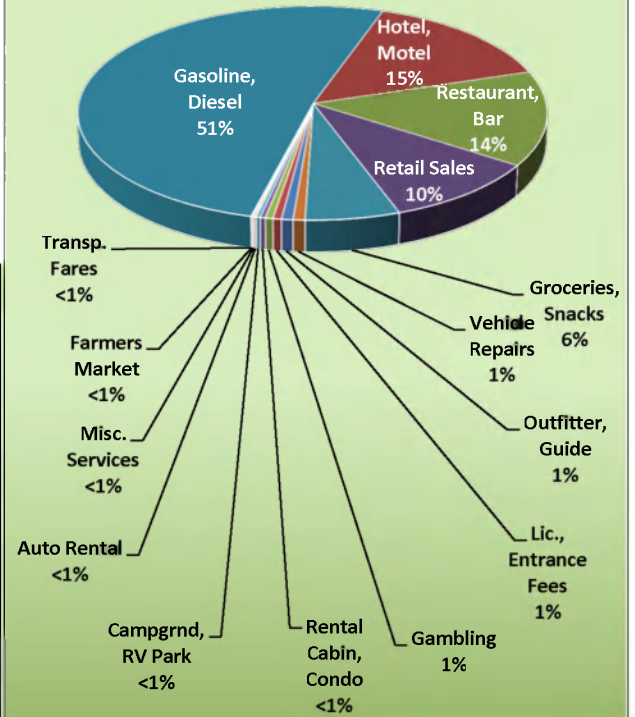
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Silver Bow County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Silver Bow County



### 2012-2013 Nonresident Expenditure Percentages in Silver Bow County



**Table 1 - Total Nonresident Spending in Silver Bow County\*<sup>0</sup>**

Gasoline, Diesel	\$58,470,000	Lic., Entrance Fees	\$610,000
Hotel, Motel	\$16,880,000	Gambling	\$550,000
Restaurant, Bar	\$16,320,000	Rental Cabin, Condo	\$360,000
Retail Sales	\$11,540,000	Campground, RV Park	\$280,000
Groceries, Snacks	\$6,800,000	Auto Rental	\$140,000
Vehicle Repairs	\$850,000	Misc. Services	\$140,000
Outfitter, Guide	\$820,000	Farmers Market	\$100,000
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$113.880.000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Silver Bow County

- 2012-2013 average spending\* in Silver Bow County by nonresident visitors to Montana totaled \$113.9 million.
- This \$113.9 million in local spending directly supports \$75.2 million<sup>1</sup> of economic activity in the region, and supports an additional \$38.5 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$113.7 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$75,180,000 <sup>1</sup>	\$15,430,000 <sup>2</sup>	\$23,060,000 <sup>3</sup>	\$113,660,000 <sup>4</sup>
Employment (# of jobs)	840	120	220	1,180
Employee Compensation	\$21,430,000	\$4,790,000	\$6,620,000	\$32,840,000
Proprietor Income	\$11,160,000	\$790,000	\$1,480,000	\$13,430,000
Other Property Type Income	\$8,220,000	\$2,410,000	\$4,850,000	\$15,480,000
State & Local Taxes <sup>^</sup>	—	—	—	\$6,630,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set *now* incorporates state-level BEA TOPI (taxes on production and imports) data, *rather than* using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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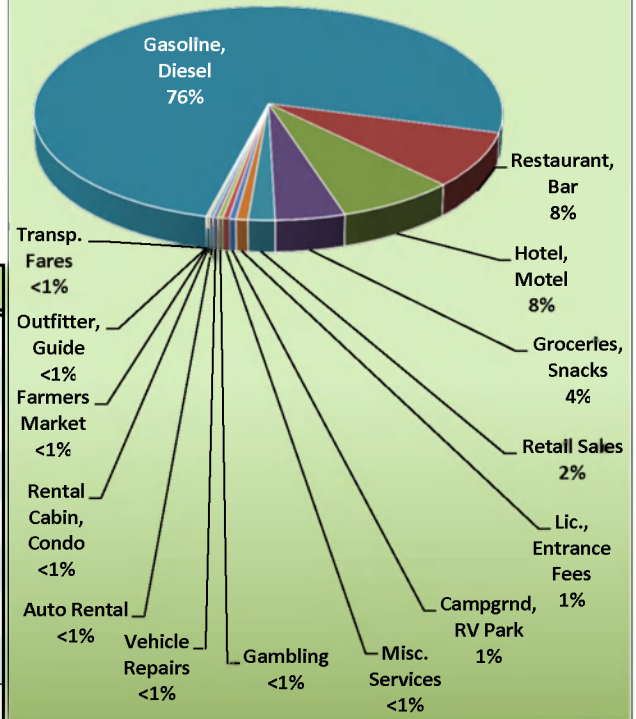
# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Toole County (in 2013 \$s)

by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Toole County



### 2012-2013 Nonresident Expenditure Percentages in Toole County



**Table 1 - Total Nonresident Spending in Toole County<sup>\*,0</sup>**

Gasoline, Diesel	\$47,120,000	Misc. Services	\$250,000
Restaurant, Bar	\$5,210,000	Gambling	\$210,000
Hotel, Motel	\$4,670,000	Vehicle Repairs	\$160,000
Groceries, Snacks	\$2,750,000	Auto Rental	\$150,000
Retail Sales	\$1,050,000	Rental Cabin, Condo	\$100,000
Lic., Entrance Fees	\$470,000	Farmers Market	\$30,000
Campground, RV Park	\$270,000	Outfitter, Guide	Insufficient Sample Size
		Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$62.450,000</b>	

## 2012-2013 Contribution of Nonresident Traveler Expenditures in Toole County

- 2012-2013 average spending\* in Toole County by nonresident visitors to Montana totaled \$62.5 million.
- This \$62.5 million in local spending directly supports \$38.8 million<sup>1</sup> of economic activity in the region, and supports an additional \$9.1 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$47.9 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$38,830,000 <sup>1</sup>	\$4,500,000 <sup>2</sup>	\$4,610,000 <sup>3</sup>	\$47,950,000 <sup>4</sup>
Employment (# of jobs)	420	40	40	500
Employee Compensation	\$11,510,000	\$1,080,000	\$950,000	\$13,540,000
Proprietor Income	\$4,290,000	\$350,000	\$250,000	\$4,890,000
Other Property Type Income	\$4,510,000	\$870,000	\$1,380,000	\$6,760,000
State & Local Taxes <sup>^</sup>	—	—	—	\$4,010,000

**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.

<sup>^</sup> **CHANGE:** The IMPLAN data set now incorporates state-level BEA TOPI (taxes on production and imports) data, rather than using U.S. data to produce state-level estimates, as was done in previous IMPLAN data sets. Comparison to previous years is not advised.

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◊Expenditure category totals may not add to overall total due to rounding.

# 2012-2013 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone County (in 2013 \$s)

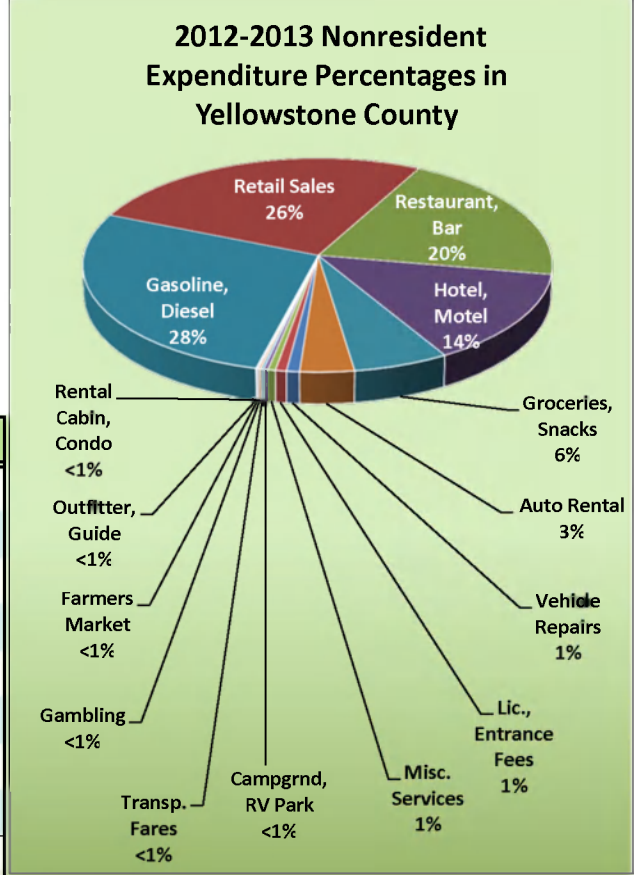
by Kara Grau, M.S.

## 2012-2013 (2-year avg.) Nonresident Traveler Expenditures in Yellowstone County



**Table 1 - Total Nonresident Spending in Yellowstone County<sup>\*,0</sup>**

Gasoline, Diesel	\$102,940,000	Lic., Entrance Fees	\$2,580,000
Retail Sales	\$98,120,000	Misc. Services	\$1,760,000
Restaurant, Bar	\$75,300,000	Campground, RV Park	\$1,000,000
Hotel, Motel	\$51,750,000	Transportation Fares	\$620,000
Groceries, Snacks	\$22,570,000	Gambling	\$530,000
Auto Rental	\$12,790,000	Farmers Market	\$450,000
Vehicle Repairs	\$3,040,000	Outfitter, Guide	\$240,000
		Rental Cabin, Condo	Insufficient Sample Size
<b>TOTAL</b>		<b>\$373.690.000</b>	



## 2012-2013 Contribution of Nonresident Traveler Expenditures in Yellowstone County

- 2012-2013 average spending\* in Yellowstone by nonresident visitors to Montana totaled \$373.7 million.
- This \$373.7 million in local spending directly supports \$288.6 million<sup>1</sup> of economic activity in the region, and supports an additional \$158.3 million<sup>2+3</sup> of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$446.8 million.<sup>4</sup>

**Table 2 - 2012-2013 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$288,550,000 <sup>1</sup>	\$76,580,000 <sup>2</sup>	\$81,700,000 <sup>3</sup>	\$446,820,000 <sup>4</sup>
Employment (# of jobs)	3,400	660	790	4,850
Employee Compensation	\$88,770,000	\$24,390,000	\$26,710,000	\$139,870,000
Proprietor Income	\$7,750,000	\$2,780,000	\$3,200,000	\$13,730,000
Other Property Type Income	\$36,760,000	\$14,240,000	\$17,970,000	\$68,970,000
State & Local Taxes <sup>^</sup>	—	—	—	\$21,600,000

**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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<sup>0</sup>Expenditure category totals may not add to overall total due to rounding.